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The Wine Spectator California Winemen Oral History Series

Joseph Phelps

JOSEPH PHELPS VINEYARDS: CLASSIC WINES AND RHÔNE VARIETALS

Interviews Conducted by  
Carole Hicke  
in 1995





Joseph Phelps

*Photo courtesy of Colorado State University Alumni Magazine*



Since 1954 the Regional Oral History Office has been interviewing leading participants in or well-placed witnesses to major events in the development of Northern California, the West, and the Nation. Oral history is a method of collecting historical information through tape-recorded interviews between a narrator with firsthand knowledge of historically significant events and a well-informed interviewer, with the goal of preserving substantive additions to the historical record. The tape recording is transcribed, lightly edited for continuity and clarity, and reviewed by the interviewee. The corrected manuscript is indexed, bound with photographs and illustrative materials, and placed in The Bancroft Library at the University of California, Berkeley, and in other research collections for scholarly use. Because it is primary material, oral history is not intended to present the final, verified, or complete narrative of events. It is a spoken account, offered by the interviewee in response to questioning, and as such it is reflective, partisan, deeply involved, and irreplaceable.

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Winery owner

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Interviewed in 1995 by Carole Hicke for the Wine Spectator California Wine Oral History Series, Regional Oral History Office, The Bancroft Library, University of California, Berkeley.



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## PREFACE

The California wine industry oral history series, a project of the Regional Oral History Office, was initiated by Ruth Teiser in 1969 through the action and with the financing of the Wine Advisory Board, a state marketing order organization which ceased operation in 1975. In 1983 it was reinstated as The Wine Spectator California Winemen Oral History Series with donations from The Wine Spectator Scholarship Foundation. The selection of those to be interviewed has been made by a committee consisting of the director of The Bancroft Library, University of California, Berkeley; John A. De Luca, president of the Wine Institute, the statewide winery organization; Maynard A. Amerine, Emeritus Professor of Viticulture and Enology, University of California, Davis; the current chairman of the board of directors of the Wine Institute; Carole Hicke, series project director; and Marvin R. Shanken, trustee of The Wine Spectator Scholarship Foundation.

Until her death in June 1994, Ruth Teiser was project originator, initiator, director, and conductor of the greater part of the oral histories. Her book, Winemaking in California, co-authored with Catherine Harroun and published in 1982, was the product of more than forty years of research, interviewing, and photographing. (Those wine history files are now in The Bancroft Library for researcher use.) Ruth Teiser's expertise and knowledge of the wine industry contributed significantly to the documenting of its history in this series.

The purpose of the series is to record and preserve information on California grape growing and winemaking that has existed only in the memories of wine men. In some cases their recollections go back to the early years of this century, before Prohibition. These recollections are of particular value because the Prohibition period saw the disruption of not only the industry itself but also the orderly recording and preservation of records of its activities. Little has been written about the industry from late in the last century until Repeal. There is a real paucity of information on the Prohibition years (1920-1933), although some commercial winemaking did continue under supervision of the Prohibition Department. The material in this series on that period, as well as the discussion of the remarkable development of the wine industry in subsequent years will be of aid to historians. Of particular value is the fact that frequently several individuals have discussed the same subjects and events or expressed opinions on the same ideas, each from his or her own point of view.

Research underlying the interviews has been conducted principally in the University libraries at Berkeley and Davis, the California State



Library, and in the library of the Wine Institute, which has made its collection of materials readily available for the purpose.

The Regional Oral History Office was established to tape record autobiographical interviews with persons who have contributed significantly to recent California history. The office is headed by Willa K. Baum and is under the administrative supervision of The Bancroft Library.

Carole Hicke  
Project Director  
The Wine Spectator California Winemen  
Oral History Series

August 1996  
Regional Oral History Office  
The Bancroft Library  
University of California, Berkeley



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## INTERVIEW HISTORY--Joseph Phelps

Joseph Phelps, founder and owner of Joseph Phelps Vineyards, was interviewed as part of the Wine Spectator's California Wine Oral History Series to document his career and contributions to the history of California wines.

Phelps has had a varied and innovative career--venturing seems to be part of his nature. Born on a farm in Missouri and raised in rural Colorado, he started early with a fly tying business developed in his high school days. In 1950 he graduated from Colorado State University in Fort Collins (then Colorado A&M) with a major in construction management. After a stint in the navy, Phelps went into business with his father, and in 1957 they formed the Hensel Phelps Construction Company. With an office in California, the firm was able to win a contract to build Chateau Souverain at Geyserville, and Phelps began spending time in wine country.

A growing interest in wine--he had been making some at home in the basement with purchased grapes--led Phelps to purchase 600 acres on Napa Valley's Silverado Trail in 1973. He started out with Zinfandel, Cabernet Sauvignon, and French Syrah. "The Syrah grape was obviously something waiting to happen in California," Phelps said, "it had been important in California in the nineteenth century, although to our best knowledge, it was never commercially bottled and sold as a varietal. As far as we can tell, our 1974 Syrah was the first commercially bottled and labeled Syrah wine; although some Syrah wines were being made, they were being blended."

The winery went on to make Viognier, and brought out its Le Mistral line, a family of Rhône-style wines, in 1989, making Joseph Phelps well known as one of the first "Rhône Rangers." Insignia became their label for Bordeaux blends.

Phelps's other innovations abound: late-harvest Riesling and Meritage wines; Eisrebe, made in German-eiswein-style from Scheurebe grapes; his formation of the Wine Services Co-op, a warehouse for a group of wineries; the Oakville Grocery, providing fine foods to go with fine wines. For Phelps, variety is his life. "The thing that, I feel, has been very satisfying to me is the good fortune that I've had in experiencing several careers. I look forward to growing in other directions the rest of my life."

Joseph Phelps was interviewed in his winery offices in December 1995. It was a stormy day, but the vineyards along Napa Valley's Silverado Trail offered a picturesque scene from the office windows. The winery's Jeff Hunsaker offered me a tour before the interview, and Joe Phelps proved to be a welcoming and hospitable interviewee.



Phelps reviewed the transcript carefully and thoroughly, adding information and substituting whole paragraphs where he felt his remarks were unclear.

This series is part of the ongoing documenting of California history by the Regional Oral History Office, which is under the direction of Willa Baum, Division Head, and under the administrative direction of The Bancroft Library, University of California, Berkeley.

Carole Hicke  
Project Director

August 28, 1996  
Regional Oral History Office  
The Bancroft Library  
University of California, Berkeley



Regional Oral History Office  
Room 486 The Bancroft Library

University of California  
Berkeley, California 94720

BIOGRAPHICAL INFORMATION

(Please write clearly. Use black ink.)

Your full name JOSEPH FRIBLEY PHELPS

Date of birth 11/12/27 Birthplace MAXSVILLE, MISSOURI

Father's full name ARLE HENSEL PHELPS

Occupation FARMER / CARPENTER / CONTRACTOR Birthplace MISSOURI

Mother's full name JUANITA CUNDIFF PHELPS

Occupation HOUSEWIFE Birthplace KANSAS

Your spouse N.A.

Occupation \_\_\_\_\_ Birthplace \_\_\_\_\_

Your children LESLIE ANN PHELPS, WILLIAM HENSEL PHELPS  
LAURIE PHELPS ANDERSON, LYNN PHELPS FINCH

Where did you grow up? COLORADO

Present community ST. HELENA, CA.

Education B.S.

Occupation(s) CONSTRUCTOR, VINTNER

Areas of expertise BUSINESS MANAGEMENT

Other interests or activities FLYING, COOKING, BICYCLING

Organizations in which you are active NAPA VALLEY VINTNERS,  
NAPA VALLEY WINEGROWERS ALLIANCE, N.Y. OPERA HOUSE  
ADVISORY BOARD, AIWF



## I GROWING UP IN MISSOURI AND COLORADO

[Interview 1: December 11, 1995]##<sup>1</sup>

Grandparents and Parents

Hicke: I'd just like to start this afternoon by asking you when and where you were born.

Phelps: I was born on November 12, 1927, in my mother's bed on a farm in De Kalb County, Missouri, not very far from St. Joseph.

Hicke: And did you grow up there?

Phelps: I lived there until my parents moved to Colorado in 1935, and I was in the third grade, as I recall.

Hicke: Okay, let's leave that for just a minute, and let me go back and ask about your parents and grandparents, where they came from and what they did.

Phelps: Midwesterners. My grandfather was a county doctor; I can remember very, very early in my life accompanying him with horse and buggy as he went on his rounds in the countryside.

Hicke: Through snow and sleet?

Phelps: Not as I recall [laughter]. But it was not what you would consider a highly paid profession; I think he took a lot of payment in kind. That's how I remember my grandfather most vividly.

Hicke: What was his name?

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<sup>1</sup>This symbol (##) indicates that a tape or a segment of a tape has begun or ended. A guide to the tapes follows the transcript.



- Phelps: John Quincy. He was one of a series of John Quincys: his father was also a medical doctor, and he had as a matter of fact been born on a caravan in Wyoming. Both he and my grandmother argued about whether it was Fort Laramie or Fort Bridger. But his father was the medical officer that accompanied the wagon train. And my grandfather had gone to Northwestern [University], and then my uncle, who delivered me--who just happened to be passing through town the day I was due--had completed his internship at Cook County Hospital in Northwestern, in Chicago. He was traveling across country to open his practice in Cheyenne, Wyoming, when I was born.
- Hicke: What was his name?
- Phelps: George.
- Hicke: Did the John Quincys have anything to do with the Massachusetts Quincys, or--
- Phelps: No, I don't think that the name went that far back. My guess is that that's where the combination of John Quincy and Phelps came from. This probably involves too much verbiage to be included in the oral tape, but it's interesting that my grandfather was one of thirteen children. Of the thirteen, he was the only one who grew to adulthood and had a male offspring. Only one of his sons--he had three sons--had children, and that was my father. My father had two daughters and two sons, and my older brother who was killed when he was twenty or so in an automobile accident was John Quincy also. Of the family, I'm the only one who had a son named Phelps, and I had three daughters and one son. My son has now had two children, one of whom is a grandson. So I have seven granddaughters and only one grandson. So the Phelps name is really hanging on by a small thread.
- Hicke: Just one person in each generation had the Phelps name. Well, good for you and your son.
- Phelps: Well, back to my parents. My father was a farmer; his name was Abel Hensel. He dropped his first name fairly early in his career and became the Hensel Phelps that remains in the name of the construction company doing business across the United States. He had a back injury early on in farming and was limited and restricted in the hard labor that he could do. It finally caught up with him and required that he find another way to make a living, and at first he tried selling insurance. That was during the Depression and tough going. He had children to put through college, and that was pretty difficult for him.



In 1937, on our farm in Colorado, he built a small one-bedroom house for my grandmother and grandfather who, quite some time previous, retired and wanted to move to Colorado also. And in the process of building this small house, he became acquainted with the local lumber dealer and a couple of subcontractors. He lived west of Greeley, which is a farm community about fifty miles north of Denver. A small university farm town. Originally it was the state normal school, and at that time it was called Colorado State College of Education. It is the University of Northern Colorado now, although it still has a very heavy emphasis on education.

In that community he found a calling, and that was to do remodeling work, primarily, and build homes--never more than one at a time, but he became a carpenter and a contractor and worked with his tools.

Hicke: He could do that with a bad back?

Phelps: He could do that, but he couldn't do heavy work. And at that time, the farm was rented out. He became a full-time builder-contractor. My mother had sort of raised two families. Her mother died when she was nineteen, and there were seven in their family, and she kind of focused on getting them through school. She married my father when she was twenty-nine or thirty.

Hicke: What was her name?

Phelps: Juanita--except she shortened it to Nita--Cundiff. And although she was born in Kansas, and her family moved around a bit, the Cundiff name does appear in the historical records of my home county in Missouri. My youngest daughter took time this summer to go back to Maysville, Missouri, to look up all the information she could find on Hensel, Phelps and Cundiff. We're going to have a family reunion in Southern California between Christmas and New Year's, and she'll be presenting a lot of this information.

Hicke: What fun. If you have something like a family tree or something, we could include that.

Phelps: We haven't finished putting it together yet.

Hicke: And your maternal grandparents, then, were from the Midwest also?

Phelps: Yes. The Hensels migrated to Missouri from Illinois and Ohio. My maternal grandfather was a station master in Skiatook, Oklahoma with the Atcheson, Topeka, and Santa Fe. The family



moved around some, because that role involved transfers from time to time.

Hicke: Did you know him?

Phelps: Yes. I knew him after he retired, but not during his working years.

Hicke: Okay, so both of your grandparents on both sides were from around that area.

Phelps: Yes, Midwesterners.

### Schools

Hicke: You spent the first eight or ten years or so of your life in Missouri?

Phelps: Right. I was in the middle of the third grade when my family moved. I attended the Hedge School in De Kalb County, which was a one-room, eight-grade school. And I transferred then in 1935; we moved, as '35 was changing into '36, at Christmastime. Then I attended a two-room school in Colorado--three grades in each room, for a total of six--and then on to junior high. My background from an academic standpoint was definitely primitive.

Hicke: But you got good schooling in those one-room schools?

Phelps: I've never regretted it; I can affirm to that. And this getting to and from school on a horse was fun, too.

Hicke: Oh, you went to school on a horse? You parked your horse in the schoolyard or whatever?

Phelps: Yes.

Hicke: Even in the winter would you ride?

Phelps: Yes. Unless, you know, the roads were impassable. Actually, the school was on the diagonal section corner from my home, so I rode through ours and the neighbor's farm to get to school.

Hicke: How about brothers and sisters?



- Phelps: I had a brother, and I have two sisters. The younger of my two sisters was, a matter of fact, just a year ago released after two and a half years with the Peace Corps in Guatemala.
- Hicke: Is that right? You have a family of entrepreneurs and adventurers. Could you give me their names, your brother and sisters?
- Phelps: My brother's name was John, and my oldest sister is Mary; she was born in 1919. My brother was born in 1920. The younger of my two sisters, Margaret, was born in 1921.
- Hicke: Okay. And when you rode the horse to school, was that in Colorado?
- Phelps: No, Missouri. I lived right across the road from the school in Colorado.
- Hicke: So was this in Greeley or was it a small town outside of it?
- Phelps: At that time, it was about a mile west of Greeley. Greeley has since grown up around it, but at that time it was out in the country, and then I had to bike ride from there to--at that time there was only one junior high school. It was grade seven through nine.
- Hicke: And high school in Greeley?
- Phelps: Yes.
- Hicke: What kinds of things did you like in school in particular?
- Phelps: I liked physics and chemistry a lot. I would say those were my favorite things.
- Hicke: Did you have any teachers that were particularly influential or memorable?
- Phelps: I think I had three at least, maybe four: my chemistry teacher, my physics teacher, my Spanish teacher, and my English teacher were all very important in my growing up and influenced my feeling about school, for sure.
- Hicke: And your feeling about physics and chemistry, obviously. And also obviously, your family had many doctors, and so there was some interest in science perhaps from them?
- Phelps: Maybe, but I don't recall that having been a particularly strong influence in my family, but since the professional influence was not at home so much--it did influence my sister,



however, I think; she became a registered nurse after she graduated from high school. This was the beginning of World War II, and she was in the navy through World War II and based, as a matter of fact, at Mare Island. Then, of course, after her husband died five years ago, one of the first things that she decided to do after getting the idea of enlisting in the Peace Corps was to go back to school and become recertificated as a nurse. Then the opportunity to go further depended on her taking a course in Spanish, because apparently the main opportunity then was in Central America. So it became necessary for her to take a six-month crash course in Spanish, and she did that.

Hicke: And this was Margaret, you said.

### Family Life, Influences, and Activities

Hicke: How about the influences of your parents and family traditions? What kinds of values did they set?

Phelps: Well, my dad, I think, was very conservative, and probably was in some ways a greater influence on what I've done in my own business life through that emphasis on being conservative in his judgment.

Hicke: Financially conservative? Is that what you mean?

Phelps: He had had very serious financial problems--

Hicke: Sure, from the Depression.

Phelps: He lost the farm twice. He had cattle and lost a farm in the early 1920s to begin with and then got a new start and lost out when there was a drought there in Missouri in the mid-'30s. And eventually he had to leave all that behind and start over again in Colorado. He was able to sell everything, but had to eventually start over again in Colorado.

Hicke: So he was conservative financially.

Phelps: Yes, having been through some very difficult times.

I think my mother's influence was at least equal, but was more in terms of ethics; I'll never forget an inscription she put in a Bible for me. I can't quote it, but it had to do with the importance of being honest and adhering to the truth. "I have to be true..." Do you remember that little quotation?



- Hicke: It sounds familiar.
- Phelps: I'm going to have to get it out and refresh my memory. "Dare to be true; nothing can need a lie. The fault which needs it most, grows two thereby."
- Hicke: What kinds of recreational activities did you like?
- Phelps: Well, with my dad I did both fishing and hunting.
- Hicke: Colorado's a great place for that.
- Phelps: Right. I lost my interest in hunting after growing up; at first I quit hunting deer out of the shock of killing deer the first time. Then within a matter of four or five years, although duck and goose hunting had been very important to me, I found that I didn't like that anymore either. So I haven't killed anything since my late twenties [chuckles].
- Hicke: Interesting how that changes, isn't it?
- Phelps: It truly is. It's such an exciting thing, you know, when you first take that up and kid yourself that it's a sport. I can remember going out and hunting ducks in late afternoons in Colorado after carrying my paper route. Then a friend and I would get our shotguns and go out in the slough and shoot ducks. It was such an attraction to me at that time, and then one day the curtain dropped, and I didn't want to do that anymore.
- Hicke: How about fishing? Did you keep that up?
- Phelps: I kept on fishing while I was in Colorado. I've not done much fishing out here; I've fished out here in the lake a little bit once in a while. But that was a big, big thing to me. As a matter of fact, one of a number of entrepreneurial things that I did in junior high and high school was to tie flies and develop fishing lures, and we'll get into that later, I presume.
- Hicke: Yes, I was going to ask you about your work activities, but go ahead with your fishing.
- Phelps: Well, that's about it. It was a big and interesting part of my life for a long, long time. And I just didn't stay with it.
- Hicke: Did they have ice fishing in Colorado?
- Phelps: Oh, I'm sure that they do in places, but fishing for me was pretty much a mountain trout, stream-type thing. Eventually,



one progresses from fishing with bait to fishing with wet flies and then eventually to tying and fishing with dry flies.

Hicke: Tying flies is quite an art form, I think, isn't it?

Phelps: It probably is in that it can be creative, but for the most part it's copying a pattern and doing it well. Because when people go to buy a dozen flies, they want a Grey Hackle or a Royal Coachman or a substantially acceptable imitation of those.

Hicke: Something familiar?

Phelps: Yes.

Hicke: They have a book that says you could use this fly for these conditions?

Phelps: Right. And then when the sun goes behind the cloud, you should shift to this, and so on.

Hicke: Like the wax on your skis and everything else; you develop these little requirements.

Phelps: The right wine to serve at the table.

Hicke: Oh, now that is important! [chuckles].

Well, speaking of wine, did your family drink wine?

Phelps: No. In fact, my family really didn't--they were not teetotalers, but they didn't keep alcohol in the house. If someone was coming over whom I guess they wanted to entertain with alcohol, my dad would go out to the store and buy a half bottle of this or a bottle of that, but it wasn't kept in the house.

Hicke: I think that's pretty standard for the Midwest. I grew up in the Midwest too, and I don't know if we ever had any Mogen David, but I never had heard of anything else.

Phelps: My mother got some Mogen David occasionally.

### Part-time Jobs

Hicke: I was going to ask you about outside activities like work, and you said you had a paper route. When did that start?



Phelps: Well, actually, the *Greeley Daily Tribune* was a big part of my life when I was growing up in that I started as a substitute carrier when I was probably twelve or thirteen years old. Then, over a period of years, I had three different paper routes, and at the same time, got extra pay by doing things like wrapping the papers that were being pushed off the press, and then wrapped with a mailer.

I became a counter; there were always two counters on a press like the one there. You take an armful of papers off the press and the carriers stand in line with a little slip of paper that gives the route number and the number of papers they're to get. This is handed to them by the subscription manager. So you count papers, like two at a time, until you get the right amount. And then, of course, if it's someone who has been helpful to you, you might slip in a couple of extra, and they can sell them on the corner, you know? You learned about politics that way [laughter].

And then for the last couple of years that I was working in the press room I also--the expression was "carried kicks." Complaints would be phoned in that the paper was in the mud or the paper didn't get there, or the paper was thrown up on the roof, or those kinds of things that happen. So I would sit at the desk from like six o'clock in the evening. I would sit and take the calls that came in. I don't know how people knew this, but generally they had to call between five and seven, and there would be a list of kicks that the receptionist could handle. So I got there, and then I would take the calls from six to seven, and then go down with my list and get papers that had been stacked up at the press room, put them in my paper bag and ride all over town to replace the missing papers. It wasn't a very big town, you know? Well, it wasn't as bad as it sounds. I think there were probably at that time maybe sixteen thousand people living in the town. It's been long since then over fifty [thousand]. But it did usually take an hour and a half or so, depending on the weather; it could make you take a lot longer, because the weather always doubled the number of complaints.

Hicke: And made it harder for you to get around besides. Did you ever get a chance to eat and sleep?

Phelps: You know, I don't remember how that worked, but I did. I certainly did. I don't remember now when I used to have dinner, but I probably ate when I got home and before I did my homework.

Hicke: Oh, you had homework to do besides! [laughter].



Phelps: Well, I'll have to admit that homework was never as demanding in my years as it was when my kids grew up and went to school. And I think probably even more so now.

Hicke: You got it done during study period maybe?

Phelps: I don't think we were that sophisticated in Greeley; I don't think there was a study period as such.

Hicke: [laughter] How about people? Did you have some special friends that were particularly memorable?

Phelps: Yes. I always had at least two or three boy friends. Didn't have any girlfriends to speak of; I didn't date until I got to college, and very little. But I was involved with one other friend, Harold Hinckley, in one of my entrepreneurial efforts, which was a print shop in his basement. And then I was involved with another friend who became my principal assistant in the fly tying business, and we had a number of other people working for us part-time, but--

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Hicke: He was the number one guy that helped you with your fly tying business.

Phelps: Yes. He kept the supplies going in two directions. But one of the interesting facets of running the Rocky Mountain Tackle Shop was--

Hicke: That was the name of your business?

Phelps: Yes. And the cellophane bags that the lures went into, the cards that were cut out, on which the flies were mounted and sold half a dozen in a card, were all printed in the print shop which another friend and I owned. So we had graphics and the whole thing.

Hicke: You were vertically integrated [laughter].

Phelps: One of the interesting things was that there was not an immediately available source of ingredients, which were somewhat rare and exotic materials--the pelts and the feathers, peacock tails, and all kinds of paraphernalia that you needed to tie flies. There was a company in Wisconsin that sold all of this sort of thing through a great catalog, and I happened to have the only catalog in the county. So we would buy the materials and sell them to the people who wanted to tie flies for us, and then we would buy back the flies, giving credit for the supplies.



- Hicke: You had a cottage industry going.
- Phelps: Yes. Also, we foresaw the shortage coming on high-quality steel hooks after World War II broke out, and I bought enough hooks to get me through three years. Since hooks became impossible to find, that became a pretty good trading commodity as well.
- Hicke: I see the beginnings of your innovative wine career here. That's why I questioned, when you said your father was conservative, what kind of conservative, because I don't think all the innovations, the entrepreneurship that you've shown is really conservative.
- Phelps: Well, it is and is isn't. You shouldn't be an entrepreneur if you aren't disciplined in terms of trying not to spend more than you make, and that's how most entrepreneurial people end up in trouble; they don't start with a big enough nest egg or they overextend themselves in terms of budgeting their costs against their income. Making a profit is what it's all about.
- Hicke: So you combined the financial conservatism with a certain amount of risk-taking.
- Phelps: Well, that's true, but risk-taking has a bad name in terms of-- the rewards are ultimately available only to those who are willing to take some risk.
- Hicke: Well, buying up the iron hooks is a certain amount of risk.
- Phelps: Oh, no, not really, when you know there aren't going to be any more.
- Hicke: Well, yes, that's true. But then the war could have ended in a very short time, so there's a certain amount of risk involved. How did you happen to get the only catalog?
- Phelps: I was the only one that knew about it, and then I just didn't--
- Hicke: Well, of course you wouldn't pass it around.
- Phelps: I read about the Herter catalog--Herter Manufacturing Company--in some obscure magazine, sent away for it, and realized it was a real resource.
- Hicke: Was this at the same time you were working for the paper, that you were involved in these other--
- Phelps: Yes. Well, there was a transitional period of time, and they all kind of overlapped between the ninth grade and eleventh



grade, I guess. By the time I became a senior in high school the only continuing tie that I had with the newspaper was working in the print shop after school and on Saturdays as a printer's devil. That was really good background and good training in that I learned so much about graphics that helps me to this day to understand the balance of a printed page and things that you need to remember about matching and contrasting typefaces and so on, and the ability to do text alignment on the page was good background. But by that time I had pretty well wrapped up the other hobbies and extracurricular activities, since that took all my time. I also got my first car when I was a senior in high school and that changed my life, and I worked in a filling station, because that was a way of being able to get coupons so you could get war-rationed gas.

Hicke: What kind of car was it?

Phelps: A '36 Ford convertible. Black.

Hicke: Did it have a rumble seat?

Phelps: Yes.

Hicke: And this was what year? Do you recall?

Phelps: Yes, I bought it at the beginning of my senior year, which would have been 1944. It was a burden to some extent, because I was really saving as much as I could to go to college. Between my junior and senior year and again between my senior year and my freshman year of college, I had the opportunity to go to work for the U.S. Land Office as assistant cadastral engineer. All the men were off fighting the war, and even college kids were hard to come by for this field work of the Land Office. So they turned, literally, to high school kids to assist the one engineer and a crew of maybe six kids.

We did surveys in case mines and surveys to reestablish metes and bounds in the Colorado Rockies. And then the last month of the second year, we were transferred up to finish the year out on the Powder River in Wyoming, and actually, on that experience three of us drove a truck from Pagosa Springs, Colorado, which is the southwestern part of Colorado, to Kaycee, Wyoming, which is north of Casper. But we were in Douglas, Wyoming, the night that VJ Day was celebrated. And then we spent the next day in Casper, which was just a ghost town, because of everybody celebrating. But that was the timing of the end of World War II and my wrapping up my career as a surveyor.

Hicke: Tell me how the car changed your life.



Phelps: Oh, I became social. I became interested in doing things that I had just not had time for before.

### Higher Education

Hicke: Did you have any idea what you wanted to do with your life at this stage?

Phelps: Not really. There was a period of time--well, I guess I knew I wanted to study engineering but I didn't know what I was going to do with my degree if and when I got it. There was a period of time when I had some mixed feelings about continuing as an engineer and I was very much attracted to studying architecture. I did as a matter of fact go down and enroll at the University of Oklahoma and went through orientation week, and after one week, there was still time to get back to CSU [Colorado State University] and enroll for my junior year there, and I did. I just packed up in the middle of the night and checked out and moved back to Colorado. One of the things that influenced that decision was that they had started a construction management course that interested me. So I decided to go back to what was then Colorado A&M. You had me listed on the outline that you sent as University of Colorado, but I didn't go to Boulder, I went to Fort Collins, which was also a land grant school, then known as Aggies--Colorado A&M, which has since become Colorado State University, and which beat Colorado University at basketball last Friday night.

Hicke: [laughter] Well, I have two children who went to Colorado University and they're both living in Boulder. So we raised these Californians that moved to Colorado.

Phelps: Oh, no, that's good. Best of all worlds--to be able to live on your own property in both Colorado and California. I have a daughter and three granddaughters and a son-in-law living in Boulder.

Hicke: Great town.

Phelps: Well, I guess I can wrap that theme up by saying that I've always had a real appreciation and interest in architecture. I think I probably could have done very well if I had become an architect. It's been a great source of satisfaction to be able to work with some wonderful architects through construction and development that I've been involved with in my life. Some of my very best friends are people who put their life into architecture.



- Hicke: So you went to the University of Oklahoma for your freshman year, is that right?
- Phelps: No, no, I would have had to transfer, because that was the beginning of my junior year that I went down there and then I didn't stay but one week. And before they closed registration back at A&M, I got in my car and drove all night and got back in time to re-enroll.
- Hicke: Was there any other university that you were interested in going to when you were a freshman?
- Phelps: No.
- Hicke: You always knew you were going to go to Colorado State?
- Phelps: It was really, you know, about the only thing available, because I think we all just considered that it took a lot of money to go to Boulder or a lot more than I had saved up. My dad, I don't know that he participated a lot in that decision; I think I just made up my mind to do that. And on the morning that I left, he drove me outside town, right past the city limits on the north, and dropped me off, and I had a suitcase and a little laundry box, a hard cardboard box with straps around it. And I hitchhiked to Fort Collins and found a place to sleep and got enrolled. And, you know, I didn't think anything about it at all; I didn't need or want anybody to be responsible for getting me to school. I compare that now with the way I see mothers going to take their daughters to college and staying with them and coming back for "Parents' Weekend" and all that. Things have changed.
- Hicke: Things change, but also individuals differ, too. As a freshman, how did you like school?
- Phelps: I liked school very well, and I began to grow up a lot. Well, I won't say grow up, because I didn't grow up until I went into the navy. But I began to become a little more socially oriented once I got to college. Another guy that I had only vaguely known from a neighboring town in high school and I applied together for a job that we eloquently called a "hasher." Houseboys at a sorority house. I got room and board there. We slept downstairs in the sorority house. So I spent my freshman year doing that, and it was great. It didn't interfere with the classes, and I think that maybe having that kind of a job may have made the difference between me really being able to have a normal life in college or to be penurious and not be able to have any fun doing anything. Because room and board is a pretty big item.



Hicke: That's a big chunk of your expenses. And you knew you were going to be an engineer before you went, or did that develop later?

Phelps: Well, actually, I never really thought of myself, and still don't, as an engineer. For one thing, I don't have a degree in civil engineering, which is what I started out in. But when they opened the construction management school, I went to that one immediately, because not only was my dad in the construction business in a way, but I had spent a year between my sophomore and junior year in Denver working as an estimator for one of the major construction companies. I learned the estimating trade there, and I think that, plus going back and having the opportunity to take electives--there were zero electives in those days in civil engineering; it took 120 hours and everything there, the closest you got to anything that wasn't straight engineering was a course in technical writing. And that was not an elective. When I switched to construction management, on the other hand, I had a number of electives that became available. I got a lot of good out of that.

Hicke: What did you take for your electives?

Phelps: Great Books, design--that was a home economics course; so you can imagine what the design was. A broad range of things: economics, business management, just a lot of things that I never would have been able to do from an engineering base.

Hicke: Your dad had never drafted you to work for him?

Phelps: No, actually, I think he wanted me to. He probably almost gave up on me then, when I went in the navy after I got out of school. When I first went before the draft board in January '46, they had essentially quit drafting people, but you still had to go have a physical.

And then the Korean War started; it was really just moving into high gear about the time that I finally did graduate. In changing majors I also had to take an extra quarter, because I didn't get all my credits transferred. So I graduated in December 1950, and I had become married, and they were taking childless married men at a high priority. I was called up and reclassified, and I was going to be sent for a physical, and I decided that I really didn't want to--if there was some other alternative--go into the army. There was a program available of OCS [Officer Candidate School] training with the navy in Newport, Rhode Island; I decided to take the physical, and if I passed it, then I knew I would pass the army physical and I had better do something about it, and I did. Two weeks later I took the scholastic test and passed that;



within a matter of three months I was on my way to Newport. That meant a longer period of [service] time than to be drafted into the army and be out in two years. After OCS, it was three and a half years. But I decided I wanted to do it anyway, and I'm glad I did, because I matured a lot in those years.

Service in the U.S. Navy

Hicke: Let me go back. You said you went into the navy in '46?

Phelps: No, no. I was called up for physical in January of '46, and this was after World War II was over, but they were still half-heartedly drafting people, but I was classified 4-F.

Hicke: When did you graduate?

Phelps: December of '50. And then I was called up for the Korean War, I think it was February of '51. Then I enlisted in the navy and was called to Newport in July '51.

Hicke: And that was OCS?

Phelps: Yes. I graduated from that around the first of December, something like that, of that year. Then I was assigned to the *USS Helena*, which was a heavy cruiser in Long Beach and sent to a communications school. And while I was at that school in San Diego--I'll never know how this happened, but I got transferred to an admiral's staff, who was the cruiser division commander, and his flag was on the same ship. So I didn't even change bunks, but I got a new boss. And then unfortunately, the cruiser division commander, once he got to the Korean War zone, which was in the Sea of Japan, and once you got there and the *USS Helena* was rotated back, the staff just went to another ship. So I went to the *Bremerton* and then finally to the *Quincy*; I was on three different cruisers for that admiral.

Then, with a year to go, the navy did me the biggest favor of all time: they transferred me to the staff of the Commander in Chief of the Pacific Fleet [CINCPAC] at Pearl Harbor. By that time, I had a daughter who was nine months old. So I went to Pearl Harbor; that was a wonderful year, a wonderful year.

Hicke: Let's back up a little. When did you get married?

Phelps: September of 1950.



Hicke: Could you give me your wife's name?

Phelps: Her name was Barbara Babcock.

Hicke: So you were in Pearl Harbor for a year or something like that?

Phelps: Just a little over a year. My son came along--

Hicke: What's his name?

Phelps: William Hensel. After we settled in there, been there a couple of months, then he was born in late August, and the navy would not transport a family back and forth until a baby was born and six weeks old. So I was assigned to another month of additional duty waiting for Billy to get old enough to fly back [laughter]. We got back in late October of '54.



## II HENSEL PHELPS CONSTRUCTION COMPANY

### Formation

Phelps: I made up my mind at that time then to go into partnership with my dad, and of course he was chomping at the bit to get out. He had been expecting me to make up my mind one way or the other years before, but then the navy came along. He hung on to the operations and kept it going long enough for me to get back, and then as soon as we started up the partnership, almost immediately he went to southern California and bought a place and started to spend most of his time there and come back in the summers. He bought a place in the desert and didn't like to spend the summers there. He came back to Colorado for summers.

By the beginning of 1957, we had decided to change the format so that he could eventually withdraw entirely. And so we incorporated the Hensel Phelps Construction Company, and he loaned me \$40,000 to buy a half-interest, and he gave me an option on buying his half for that same price. So within a matter of a year and a half or so, I had been able to buy my dad out, and he was able to fully retire.

Hicke: He patiently waited for you all that time.

Phelps: Right, and made the process much simpler and facilitated the more rapid development of the company by having given me--in addition to a lot of good values, he had established an impeccable reputation and credit, so it just never was a problem to become established.



Early Responsibilities

Hicke: What were your challenges and responsibilities in taking over this business? That was quite a change from your previous life.

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Phelps: I don't know that I looked at it as a specific challenge, but I know that what would be the area of most significant growth was learning the principles of identifying the people that I wanted, needed to have to build a team with. Identifying the qualities and learning how to motivate and to help people develop their own skills and abilities.

Hicke: Personnel management is a part of it.

Phelps: Right. It's an ongoing process. Certainly some people have a greater gift than others for the ability to identify, communicate expectations, and set goals with other people, that sort of thing. For me it was kind of a trial-and-error process; I think I was fortunate in the quality and availability of people to associate with, and I think pretty much in two or three years I had developed the team that was important to me. That part of my life--the years between getting back to civilian life and the time I turned forty--was undoubtedly the most productive time of my life. So much happened in that relatively short period of time. I was twenty-eight years old when I got back on the track, and by the time I turned I turned forty I pretty much had laid the groundwork for the rest.

Hicke: That was a crucial decade.

Phelps: I realize that it's only because I'm in the wine industry that I have the opportunity to be included in this history, but the circumstances of my earlier career not only influenced my decision making in the wine industry, but literally made it possible in an economic sense. Without question, I am indebted to dozens of people who contributed in one way or another to my successful years in construction, but I'd like to single out just three. I've already mentioned my father, Hensel Phelps, who left all of us in the company that bears his name the legacy of a solid reputation for integrity, fair dealing, and prompt discharge of all obligations.

Above all the others, a man who has contributed most significantly to what I've done and have in my life today--both as a business associate and as a paradigm of achievement--is my



successor in the construction business, Bob Tointon. Bob joined us in 1963 as a field engineer and earned his way quickly through the ranks to become, in 1965 or 1966, vice president for operations and then, in 1975, president of the company. He had, however, been virtually in charge of day-to-day field operations from 1970 on. His attributes as a business leader were recognized by many other than myself in that he has served or still serves on such important regional boards as Bank One of Colorado, Mountain Bell, and Public Service Company of Colorado. He has been chairman of the Trustees of the University of Northern Colorado and very active in a number of worthwhile organizations, including the Boy Scouts of America. He is now chairman of Phelps-Tointon, Inc., which was formed in the reorganization of Phelps, Inc. in 1989 to include all of the non-general contracting assets of the former holding company.

The other contributor I wouldn't want to leave out of this history is Bob Ruyle, who was vice president and general counsel of Phelps, Inc. and its successor companies from 1969 to 1993. I was seldom able to beat Bob in singles, but one of the few times I did was the afternoon that I suggested to him that he should consider closing his own law office, of which we were often a client, and join me in trying to bring order to the increasingly complicated challenge of dealing with government agencies, unions, and an ever more litigious society, as we developed into a nationwide contracting company. He has been a most valuable friend and associate and I owe a lot to Bob for the big part of his life that he put into the success of Hensel Phelps Construction Company.

I'm going to let you take the lead and transition from here to the sort of thing you want to go into.

#### Beginning Interest in Wine

Hicke: You've already told me that one of the things you learned or had to learn was personnel management. Before we get to Souverain [winery], is there anything else in this decade that impacted your wine career particularly?

Phelps: Well, we haven't really touched on how my affection for wine began. That was actually back in the college days. One of the years I was in college I roomed with a fellow that had been in the Fifth Army Infantry in World War II; they landed at Anzio, and he was with that group that fought their way up the Italian peninsula and then over to Marseilles. They fought their way



up the Rhône and crossed the Vosges Mountains into Alsace and obviously liberated a lot of fine wine. Sam had developed a very keen awareness of wine; he had actually grown up, which is sort of a rarity, in a home where fine wine was a part of life.

Hicke: What was his name?

Phelps: Sam Cooper. Through Sam, I became aware of what is good and learned a little about wine. And that experience was kind of one of the building blocks. I finally got around to spending a little time traveling and learning more about wine and food. Then in the mid-sixties, after I had established an office in Burlingame, I was here in the [Napa] Valley from time to time and began to experience the California wine country. I made an arrangement with the Compleat Winemaker here in Napa Valley to buy and ship grapes to Colorado, where I made wine in my basement. Not necessarily wonderful, but it was all right.

Hicke: What kind of grapes were you using?

Phelps: The first two years I did Cabernet [Sauvignon] and Zinfandel, and then one year I branched into Riesling and Chenin Blanc. But my whites were not as successful as the reds. So I had that little bit of a background.

Hicke: When did you start your office in Burlingame?

Phelps: In 1966.

Hicke: So you were coming out here trying to find--

Phelps: Right.

Hicke: And didn't you plant some grapes also?

Phelps: I planted grapes in Colorado -- French hybrids that I bought from Philip Wagner in Maryland. That was a very difficult encounter with nature; northern Colorado is just too close to the Arctic Circle to really have viticulture. There is, of course, a burgeoning wine industry of sorts in Colorado, with some *vinifera* in the Grand Junction area. But I was in the wrong place, a few years before my time.

#### Building the Souverain Winery (now the Rutherford Hill Winery)

Phelps: There has long been a somewhat apocryphal version of our history that we came to California to build the Souverain



Winery. Actually, we were already in California and had been for quite a few years. But even before I had set up an office in Burlingame, I had established a correspondent banking relationship with the Wells Fargo Bank in San Francisco. This was before the days of "Money Market" funds. We developed a little homemade money market fund that involved wire transfer of payments from various Corps of Engineers Districts and headquarters of our national clients to the Wells Fargo, where the pooled funds would be invested and/or reinvested almost daily in short-term CDs, banker's acceptances, etc., to keep those dollars working for us during the days we were paid and the days on which we were committed to pay our sub-contractors.

Our contact in the national division of the Wells Fargo was Adolph Mueller. In 1971 he and Fred Holmes, who was one of the original partners in the Robert Mondavi Winery, put together a plan to buy the old Souverain (which is now Burgess Cellars) from Lee Stewart, who had revitalized the facility in, I think, the '50s. Later on, of course, they elaborated on that plan to build another winery in the Alexander Valley and then sell the company to Pillsbury.

Anyway, Bud Mueller was a little concerned about whether or not the job was big enough to attract enough contractors to have a totally competitive situation when they put the Souverain job out to bid, so he asked me, as a favor to him, if we would bid on the job. Our Pacific Division, based in Burlingame, was primarily involved in heavy construction, such as BART, Corps of Engineers, and Bureau of Reclamation work--bridges and structures, rather than building work--but we decided to go ahead and take a look at his project on the theory we could transfer people here from Colorado if we were the successful bidder. His concern was well founded, because we didn't put together a really tough bid, but we were several thousand dollars under the second bidder and felt we could complete the project well ahead of schedule. There were some attractive bonuses offered for early completion also, so we transferred the people necessary and that was the construction of our first winery.

Shortly after work commenced, Bud asked us to be the construction manager, overseeing both the design and construction of the Souverain plant at Geyserville, and work on that started late in 1972. That winery was ready for production in July of 1973, and Souverain Napa Valley started crushing in '72.

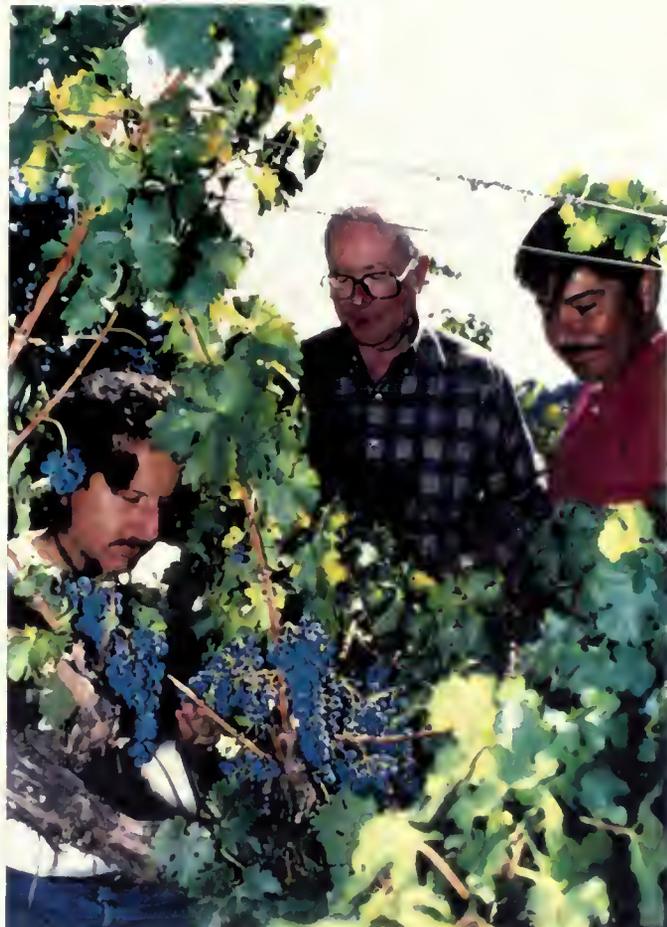




Friends and neighbors observing first crush at Joseph Phelps Vineyards, September 9, 1974.



From left:  
Craig Williams,  
winemaker,  
Joseph Phelps,  
chairman, and  
Bulmaro Montes,  
vineyard manager.  
1993.



From left:  
Tom Shelton,  
president,  
Joseph Phelps,  
chairman, and  
Craig Williams,  
vice president  
of production  
and winemaker.  
1991.





Winery entrance and trellis. Joseph Phelps Vineyard. 1982



### III JOSEPH PHELPS VINEYARDS

#### Locating the Property

Phelps: Once we had a crew out here doing this kind of work, it probably contributed to my interest in going ahead and buying the ground and building a winery for myself, which I kind of always wanted to do but just hadn't been triggered.

Hicke: So you were driving up here to the Napa Valley looking around at available vineyards?

Phelps: Sure. I had fallen in love with this property earlier on because I am a farm boy, and I had experience with a couple of ranches in Colorado. Just the glimpse of the purebred Polled Herefords that Pat Connolly used to run on his ranch--you could see them as you rode by on the Silverado Trail; you only get a little cameo shot of it between the knolls. I had really fallen in love with the property, and when it became available--or at least the realtor that I worked with in San Francisco thought it might become available--we put an offer in and ended up with the property. That was actually in January '73, and by March of '73 we had the property.

I had previously owned property at the intersection of Silverado Trail and Zinfandel Lane, which I purchased from the Christian Brothers in 1972. Our plans involved a smaller winery at the foot of a small knoll on the property facing the beautiful, old, double-vaulted bridge over the Napa River. This location, as a matter of fact, influenced our choice of names when we first incorporated our business as "Stone Bridge Cellars." We had filed for a use permit on that property, and the final hearing was going to be the last Tuesday of January, as I recall, of 1973. The afternoon of the day that the permit was to have its final hearing, we got word that we were going to be able to buy this property. I put that permit on hold--in abeyance--and then I eventually began to repeat the process



here on this property, which was big enough to have a lot more vineyards.

Hicke: How many acres was it?

Phelps: Fifteen. Down on Zinfandel.

Hicke: Oh, that's the earlier piece, but how many did you buy here?

Phelps: Oh, just a little over six hundred.

Hicke: And there was nothing of a vineyard here?

Phelps: Not a grape on the property. Lots of nice-looking cattle.

Hicke: What happened to those? They left with the sale of the property, or did you buy those, too?

Phelps: Actually, Pat had sold his herd the year before, when he had been diagnosed with terminal bone cancer in '72. They had a nationally advertised, very successful sale of his herd here, and so it was only a matter of time until the land would probably become available also. I got to know him through negotiations; a wonderful guy. He lived on for a few months after we bought the property, but he was never able to come up and look at it.

Hicke: Did you investigate the suitability for grapes?

Phelps: Not really well. I had two people come on the property with me before I closed the deal, one of whom was Ivan Schock, who passed away a month ago and whose service was a couple of weeks ago. Ivan was an associate of Fred Holmes and a longtime vineyard manager operating in the Napa Valley. Ivan had come on the property and said grace over it, although he gave me, I think, some good advice that I should also be looking for some different soil on a different location for Cabernet, which we eventually did. He correctly predicted that this would not necessarily be a number one Cabernet location. We also had André Tchelistcheff look at the land before planting started.

Hicke: You were looking for Cabernet, or--

Phelps: Oh, actually we weren't focused on Cabernet; we were looking at the possibility of having two varieties, and of course it turned out to be even more than that that we were interested in. This, interestingly enough--even though the soil wasn't that well drained, and it was probably not exactly the right climate for Cabernet--we thought it was a superb red wine location, and so we committed pretty heavily to Zinfandel and



some Cabernet, but there was still some prime acreage left uncommitted in '74. We were trying to decide what we would plant where.

Actually, that was '74, because in '73 we had to build a reservoir and weren't ready to plant this part of the property. We planted down by the river in '73, but this was in mid-summer of '74; we still hadn't totally decided on what we were going to do here. I wanted to find the answer--what I thought would be an ideal red grape location and suggested to Walter that we should find out what would be required to--Walter Schug was our first winemaker--to bring in Syrah, which had been a favorite wine of mine, Côte Roti and Hermitage. So he called and spoke with Professor [Harold] Olmo at [University of California] Davis as to what would be involved and how long it would take to get materials available for propagation. And he said, "Well, you don't have to do that at all; I did that for you in 1935."

There was a vineyard just across the river from Zinfandel, which was owned by Christian Brothers, the Wheeler Ranch. They still had ten acres of the true French Syrah that was the only survivor in the state from the experimental propagation that Olmo had done in 1935. Then in 1946--someplace in there, '48--he had to take Syrah out of the experiment station. And so he talked the Christian Brothers into moving it over to the Wheeler property. They had never done a varietal Syrah, and these grapes ended up in their red burgundy program. So we were able to buy ten tons of the fruit and all the budwood that we wanted. And it's in that year that we started our Syrah program.

Hicke: Now this is where you really were a pioneer, so I want to go back a little bit to talk about some of those things. First of all, tell me how you knew Walter Schug and how you got interested in Syrah.

Phelps: Okay, well, let's go back to Walter. In the process of working with the management of Souverain and particularly designing and making plans for the Geyserville operation, Bill Bonetti, who had been with [Charles] Krug [Winery], was selected by Souverain to be the winemaker at the property in Geyserville. When I knew for sure that I was going to buy this property, I got in touch--well, actually, it was even when I was working on the design for the property on Zinfandel. And so it was before '73, late '72, I interviewed two or three winemakers, including Joe Cafaro, who was then assistant winemaker at Chappellet [Winery]. Gino Zeponi was involved a little bit in my conversations, but Bill Bonetti recommended Walter Schug. And as soon as I met Walter, I realized that this was probably the



right move for us to make. He consulted with us on the Zinfandel Lane property with the understanding that if we went ahead with it, he would come to work. Then, he actually did. His first day with us was the day we took possession of this ranch--the first of March in '73.

Walter was very, very good at the planning steps and equipping the winery.

Hicke: He had a German background, right?

Phelps: Absolutely. Walter's father was the regisseur at Staatsweingut Assmanshausen, which is the only one of the nine state-owned, formerly church-owned, wine estates in Germany, that made red wine. They grow Spätburgunder, which is actually Pinot Noir. Kind of pink, but they're awfully close to the Arctic Circle for red wine [laughter].

So Walter had grown up on a wine estate in Germany and had gone to Geisenheim and was a natural for this job. After Walter had left Germany, he worked for a bottling company in London, and then eventually came to the States and worked for one or two large producers in the Central Valley before connecting with Gallo [Winery]. He moved to St. Helena as Gallo's wine country representative for quality control in the wineries that they bought product from, most notably Frei Brothers, which they eventually bought out. Also the two co-ops here in St. Helena, the Napa Valley Co-op--which only recently closed its doors--and then the North Co-op, or the Little Co-op, as it was known. It had ceased to be a viable winemaking facility by '72. However, it is very much alive now--completely rebuilt by new Japanese owners, and is known as Markham Winery. In Sonoma County, Walter operated as Gallo's representative with regional growers and also did quality control work, in addition to Frei Brothers, for Martini & Prati as well as Seghesio.

Hicke: He had a lot of different things.

Phelps: Yes. Walter was interested in eventually having his own winery. In 1980 we helped him with a three-year phaseout--actually, it was a five-year plan that we worked out to do it in three--to start his own winery in partnership with Jerry Sepps and has long since built his own winery over on Bonneau Road in Sonoma County.

His efforts continued to be important to us in the sense that in 1976--Walter had had one other assistant winemaker--but in 1976 he hired Craig Williams as assistant winemaker, and by 1980 Craig was pretty much responsible for red winemaking.



Then in 1983, when Walter went full-time into his own winery, Craig took over all production control, including vineyard operations, and the wines have been over his signature ever since.

Hicke: I also see his influence in your German wines, but I don't know whether you want to talk about that or get back to the--

Phelps: There's no question that Walter's input had an awful lot to do with the prominence of Riesling as one of this winery's important wines. Interestingly enough, that doesn't come from his own family's estate, but rather from his father-in-law who was an important wine negotiant in Wachenheim, in the Palatinate. So that we had a lot of input on our Riesling from the Rheinpfalz rather than the Rheingau.

I think that will take care of that part of it for now. Syrah was important--

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Phelps: The Syrah grape was obviously something waiting to happen in California, and it had been important in California in the nineteenth century, although to our best knowledge and belief, it was never commercially bottled and sold as a varietal. But we only know for sure going back to pre-Prohibition, and as far as we can tell, our 1974 Syrah was the first commercially bottled and labeled Syrah wine, although some Syrah wines were being made but they were being blended.

Our confidence in Syrah, which has eventually been vindicated, was based primarily on the fact that it is such a noble variety in France and relatively rare. But you may recall that in the eighteenth and nineteenth centuries in the British market, particular Bordelais wines that were from a relatively insignificant year, or a less than important year, would command a much higher price if they could claim to be "Hermitaged." What that expression meant was that the estate had brought barrels of Syrah from the Rhône and blended it with the Bordeaux varieties of the estate. That made up the middle body and extractive elements that were lacking in a less than wonderful year. So there was a lot of background for that. And of course in Australia, Shiraz is one of the finest and most expensive wines of a number of the old-time producers, particularly the wines of Penfolds, La Grange Hermitage. I bought some the other day, and even the '92 is almost \$100 a bottle. But that's a blend of Syrah and Cabernet.

Hicke: Where did your interest in Syrah come from?



Phelps: Just from having collected Côte Rotie's and Hermitage of several producers, primarily Guigal and Chave, and enjoying them--wines from the fifties and sixties--and wondering why you couldn't find this grape in California. Then we finally did. But I will have to say that the clone that Dr. Olmo had worked with in '35 and '36 is not the very best of the available clones, and we're experimenting now with three or four other clones. More particularly, we're learning that the cooler growing regions are more likely to develop a Syrah of more intense varietal character.

Hicke: On that hill over there--

Phelps: That's Syrah, and that's been pretty good. The hillside's better than the valley floor.

Hicke: Because of the importance of cooling?

Phelps: Better drainage, and it's a little cooler up on the hillside at night.

In 1985 we planted a one-acre experimental plot of Syrah on one of our Stag's Leap properties. Unfortunately, this planting has since been the victim of phylloxera and has been replaced by Cabernet. From it, we were able to confirm the affinity of Syrah for a cooler growing region and subsequently, in '90, we planted some Syrah in Carneros, and this has provided us with additional valuable data.

Hicke: Is that because of climate or soil?

Phelps: Climate.

Hicke: Didn't I read someplace that you traveled through the Rhône district of France, or was that later?

Phelps: Actually my first trip to France included a trip through the Rhône Valley, but that was several years before buying this ranch. You may be associating my interest in those wines with the fact that I've owned a home in the Luberon for several years.

Hicke: Yes, I didn't know which came first: your travels in the Rhône Valley or your interest in the Rhône wines.

Phelps: I started looking for a farmhouse in Provence in '85, but I didn't find what I wanted until '89, so that's relatively recent. We started making this wine in '74.



Viognier

Hicke: Yes. And you had primarily just tasted it; you hadn't been to the Rhône area.

Phelps: Oh, yes. I had been there, going back into the early seventies. In your correspondence you asked about our early work with Viognier, and that has been a long, hard, slow battle propagating Viognier to the point where we could really develop significant quantities. But our interest in Viognier, at the outset in the mid-seventies, was not as a varietal; we were interested in Viognier because in Côte Rotie that's allowed or expected to be a major contributor up to 20 percent; may be blended with Syrah, as is Marsanne in Hermitage. So we, in order to try to get some grace into the Syrah, which was a very forward brute, in '82, we got our first budwood. Up until that time, we had been experimenting with blending Chenin Blanc and Grenache with Syrah, small lot experimentation. We had co-fermented with Grenache; we just hadn't found the right blender, and that's what led us to Viognier.

It took a long time to get our Viognier production up to the place where it was more than just experimental, and by that time there was so much demand for the Viognier, as a varietal, and since we had not particularly developed the right answer on blending it with Syrah, so we diverted in that direction. But so far, we're finding that there are other things that we can do in the vineyard that are more productive and more helpful to us in getting the Syrah where we would like to have it.

More on Syrah

Phelps: And, quite coincidentally, the *Wine Spectator*, on November 15, gave us a nice 92 [rating] on the '92 vintage.

Hicke: That is impressive.

Phelps: Pretty hard for a red wine to get in the '90s with all the Cabernet and Pinot Noir competition.

Hicke: That's true. [Looking at magazine] Maybe I can get a copy of that.

Phelps: You can have that.



CANADA \$3.95/39fl/£2.50 DEC. 15, 1995

# Wine Spectator

## Highly Recommended



### 92 Joseph Phelps Syrah Napa Valley Vin du Mistral

**1992** Intense and tightly wound, with a ripe, complex core of pepper and currant flavors. It picks up an earthy, oaky tone on the finish before the tannins clamp down. Given its weight, it has a remarkably smooth texture at mid-palate. 500 cases made.



Hicke: Thanks. Is there anything else about the Syrah that you can tell me, about the development of clones and how that went and who worked on it?

Phelps: Well, Craig has done all the work on the Syrah clones. Actually, I would defer to him on an informational basis. The U.C. [University of California] Davis sources really refer to only about three different clones, some of which are called Shiraz.

Hicke: It's the same grape?

Phelps: It is the same grape, right.

Hicke: But there's a Syrah and Shiraz.

Phelps: Well, the original name for Syrah was Shiraz, and that's what it's called in Australia.

Hicke: I thought you said there was a clone by that name.

Phelps: There's a Shiraz clone, yes.

I don't think that I've got an awful lot more to this particular point.

Hicke: How about marketing the Syrah?

Phelps: Well, it was a real struggle. I came into the wine business with the misconception that there would be an advantage to be the only one to be a pioneer and be able to say, "We're the only house that makes Syrah." That just isn't the case, and I learned the hard way: it's much easier to sell Syrah now that there are twenty or twenty-five wineries making a Syrah. So we sort of broke our pick on Syrah in the early years. It was a pretty good wine, but people didn't know what it was. And then there was the confusion with wine made from the unrelated California Petite Syrah. The wine in the early years wasn't always that ready to drink at the time it needed to be sold. It's a very, very surprising ager, though, and the more difficult vintages that we thought were going to be a problem for us--ten years later, they just taste wonderful. It's a wine that doesn't always have instant charm.

Hicke: I guess in today's wine drinking public, people are looking for instant charm.

Phelps: And yet even that is not always easy to market, depending on how it's designated--as a varietal or as a proprietary blend. We have a very, very wonderful blend of Rhône wines called Le



Mistral. It's just an absolutely delightful, engaging wine, and it's ready to drink, you know, two years after the harvest. And it is a Châteauneuf du Pape style. Wonderful, wonderful wine. In fact, I'll give you an interesting article that was just out last week or the week before from Mike Dunn of the *Sacramento Bee*, in which he was very, very complimentary of the wine, and he gave it a 93. But he's also spending half of his article talking about how difficult [it is to sell], and this came as a surprise to him to find out that we still have a lot of wine that we released in September, because he thought it would be all sold out within a matter of weeks after it was released. But this is not an easy wine to sell because people are very inclined to want to see a variety on the label. It's an educational process that goes on and on and on, to get them to try a blend. Once they try it, they love it.

Hicke: I want to go back to the Meritage-type wines a little bit later, but let me first back up and ask about building the winery. That was right along your line of business; I trust you had a major hand in it.

Phelps: Interestingly enough--and I guess this probably reinforces the idea that Souverain was that important to us--the architectural concept for the building was done by John Marsh Davis, who was the design architect--although he didn't do the working drawings--of the two Souverain wineries. So it was natural, when I had really fallen in love with his style, to have him do this one for us in 1973. And I'm sure you'll notice the similarity, particularly between this winery and Rutherford Hill in the use of redwood and the trellising.

Hicke: Yes, it's a really lovely building. How long did that take, and what were the special challenges in building it?

Phelps: Well, we had a bad winter in '73 and couldn't continue construction. We built a road and started the foundation in the fall of '73. We were relatively late in the year, because the timing of our application for a use permit here coincided with about the most stringent use permit requirements, land use requirements of the last twenty years. It was a six-hundred acre ranch, but it didn't make any difference whether we were planting vines in a given place or whether a winery was going to be built; we still had to have the bird count and the archeological exploration and all that sort of thing for the entire six hundred acres. It was just one frustrating process after another to get the use permit cleared for this, so it was really like, I think, the end of September before we could start. So we were only, like, finished with the foundation and beginning the substructure when the rains of November shut us down in '73. We remained shut down until it was mid-April of



# The Sacramento Bee

November 29, 1995

## WINE OF THE WEEK

By Mike Dunn

When I find a wine I like, and which I suspect has a story to tell, the first thing I ask the winemaker is whether it's still available. To write favorably of a wine no longer on the market is to invite angry phone calls from irritated consumers.

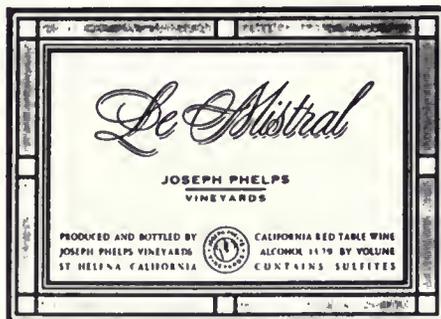
Initially, therefore, I was relieved to learn that of the 6,900 cases of the 1993 Le Mistral (\$15) that Craig Williams made at Joseph Phelps Vineyards in the Napa Valley, some 5,700 cases remain in the winery's cellars.

Upon further reflection, however, I was mystified that so much of this extraordinary wine has yet to be sold.

Though the wine was released only in September, there's simply no reason why it shouldn't be flying off store shelves. The proprietary name Le Mistral, after all, is taken hopefully from the wind—*le mistral*—that whips across France's Rhone Valley.

Well, there is a reason. Americans prefer their wines as varietals—Chardonnay, Pinot Noir and the like—and are wary of blends that bear proprietary names. Even though the folks at Phelps have done their darnedest to explain that Le Mistral was inspired by a grand old French tradition—the blending of several Rhone Valley grape varieties in the mighty and honorable wine Chateauf-neuf-du-Pape—American bibbers still seem inexplicably reluctant to get with the program.

If they just would take one sip of



the '93 Le Mistral, they'd recognize that here is a wine whose impact is greater than the mere sum of its parts, and they quickly would move beyond their pro-varietal bias.

Seven different grape varieties go into the wine. The three principal ones are Grenache (54 percent), Mourvedre (23 percent) and Syrah (13 percent), all major players in the southern Rhone Valley. Supporting roles are played by two other Rhone varieties, Cinsault and Carignane, and two veteran California workhorses, Alicante Bouschet and Petite Sirah.

The upshot is a marvelously harmonious wine that captures the youthful raspberry fruitiness of the Grenache and rounds it out with the pluminess of the Mourvedre and the jamminess of the Syrah. The bit players help provide structure, softness and color, adding up to a wine that while sturdy nonetheless crosses the palate with uncommon grace—round in feel and long in flavor.

Food suggestions: Craig Williams likes the wine with grilled chicken and vegetarian pastas heavy with tomato sauce, olive oil and garlic.



'74. Then we had no problem getting the winery complete enough for the crush in '74 and that was our first crush year.

We did make wine in '73: Pinot Noir, Cabernet, and Johannisberg Riesling. The Cabernet and the Riesling were made at Souverain, and the Pinot Noir was made for us by Joe Heitz, who took us in out of kindness and because we had extra Pinot Noir [grapes] that he wanted. So he took half of our grower's Pinot Noir and made Pinot Noir for us that year. And when I say he made it, that's kind of the way it was, whereas at Souverain, Phil Baxter was the one making it. He had come to Souverain from--he also had been at Krug under Bill Bonetti. He had been there for the '72 opening harvest at Souverain, and then '73 was his second harvest and our first. He was totally open to letting Walter call the winemaking shots. That was particularly appropriate, because of the coinciding of the fact that nobody had really made a Spätlese-style Riesling, except Wente [Brothers Winery] had done a little bit two or three years earlier. But the world was ready for a California Riesling that was off-dry. Walter consulted with his father-in-law and got it made just that way, and that became our style for a number of years.

Hicke: Well, that's another major innovation.

Phelps: It was almost a first, let me put it that way. And then, interestingly enough, tastes changed and by 1977 it was time to do a kabinett-style Riesling, and we called it "Early Harvest." Grapes were brought in at twenty, twenty and a half, or twenty-one, and made in a drier style. That was never as popular as the regular Spätlese-style Riesling. At one point we made sixteen thousand cases of dry and off-dry Riesling wine and two thousand cases of sweet. It was a big component of our total production. Then almost as suddenly as it began, the American palate moved away from that sort of thing, and it became very difficult and we gradually withdrew from the growing of Riesling. We have a contract with a grower in Anderson Valley that cooperates with us to achieve a botrytis condition so that we can bring those grapes in for a much heavier must-weight wine. Unfortunately, in the last two years, the vineyard hasn't been able to become fully botrytized; we have not had the Beerenauslese or Trockenbeerenauslese level that we would like. So we're settling for just an Auslese or a late-harvest style.

Hicke: How about marketing that? Was that a challenge?

Phelps: Well, it was a challenge when we made lots of the wine. It's not a problem now. Oh, you're referring to the dessert wine.



- Hicke: Right. The Rieslings in general, I mean, each one.
- Phelps: Well, the sweeter the Riesling is, the less of it, of course, we produce and the easier it is to market, because there is a demand for the very sweet botrytized wine.
- Hicke: Is there? So that wasn't difficult.
- Phelps: No, we've never had a problem selling the higher must-weight wine.
- Hicke: But the Spätlese--I was just asking about the early dry Rieslings, which were not very well known in California.
- Phelps: The early harvest.
- Hicke: When I said early, I meant the first ones you did. But also the kabinett-style.
- Phelps: I'm going to say that particularly the wines and the style of '73 through '76 were in great demand. That style continued to be in great demand until maybe 1986 or '87. It's in the '80s that we built the level of production up to sixteen thousand cases of that style wine. The early harvest was drawn along, I think, and the style of the other wine didn't really change but it became less sweet. At one point, the residual sugar in our Spätlese-style wine was as high as 2 1/2 percent, and it finally settled back down to around 1 1/2. That seems to be where those people who like that style of wine now are most comfortable.
- I'm not sure that I'm answering your question, but I think the biggest single factor, when you get right down to it, is an increase in the sophistication of the buyer and the tendency to move away from semi-sweet wine or off-dry wine on the one hand, and then the tremendous popularity of Chardonnay --paradoxically, the take-off of Chardonnay really came in the early '80s when wineries began--and some people say as a consequence of stuck fermentations, but people began to leave residual sugar, above the threshold, in Chardonnay as high as .8; that's been, I think, the driving force behind the popularity of Chardonnay as a fighting varietal--the amount of sugar left in them. So the masses like off-dry Chardonnay, maybe, a lot better than they ever liked off-dry Riesling. And who knows: Chardonnay, it's is easy to say, is a cult of the tongue.
- Hicke: It's interesting to me that you said you made a range of residual sugars and changed it--you know, you went up and then



back. How did you get the feedback? How do you know what people are wanting?

Phelps: We monitor restaurant sales very carefully and very closely and are guided a lot by that. We certainly pay attention to wine critics, and we're influenced by that, in a subject of that nature. How else will you know what the public, what the consumer wants?

Hicke: Well, it would take years to figure out what percentage is buying a little more of this or a little more of that because of a little more sugar or a little less sugar, so that's why I asked.

Okay, I'm not sure that we ever got the winery built, but it did happen eventually [laughter].

Phelps: Well, we were ready for the crush in September of '74. After the harvest, we finished the rest of the building and so on, and we occupied this level in January of '75.

### Equipment

Hicke: How did you make decisions about equipment, and what did you get?

Phelps: We were definitely influenced by the movement toward stainless steel and temperature-controlled fermentation. We came at the right time to be part of that movement. We were prior to the availability of the new wave of crushers, for instance; we accepted pretty much fifty-year-old technology in our original Healdsburg crusher.

Hicke: Is that the Healdsburg Machinery Company?

Phelps: Right. We were still a few years away from automated, very sophisticated, programmable presses, although we moved into that within a matter of three or four years after we opened. We had a certain amount of trial and error; we didn't plan the winery for enough intermediate oak, for instance, and we were lacking in capacity to move wine back from small to appropriate intermediate-oak aging prior to bottling. We didn't have enough intermediate oak to do wines that we didn't want to go into small oak barrels, like Sauvignon Blanc, for instance. So that gave birth to the need for the addition that you undoubtedly went through today, which went on in '78, what we



call the Oval Room. It's where all the array of German ovals is.

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Phelps: In '78 I was out working with a surveyor staking out the addition. It was going to be the entire length of the north wing, but it was only going to be wide enough to permit the ovals, which are about eight feet, plus another eight for a corridor that pumps and filter presses and hoses could be moved back and forth in. And I realized that I was missing an opportunity: for a very little additional expense, we could put another eight feet in the width and have a room big enough to accommodate the ovals, but also have space where we could set up tables for tasting or entertaining. So that room became what it is as a afterthought to the original design, and we just kicked the wall out another eight feet and made a multi-purpose room out of it. And, of course, then that required adding a kitchen, so that we could have catered events or cook-in events there. So that opened in '79.

Hicke: That table is just spectacular.

Phelps: The kitchen table?

Hicke: That one too, but the one in the Oval Room.

Phelps: Oh, that belongs to Belle and Barney Rhoades. That had been in their home in Piedmont, and when they moved to their home here in Bella Oaks they gave that to me on a long-term, no-charge-for-storage basis [laughter]. They've since told me that it should stay here forever, but it is gorgeous, isn't it? It fits in beautifully; it gives the entire room a different feeling.

Hicke: It's a work of art.

Who made the decisions on the equipment?

Phelps: Most of the decisions were recommended to me by Walter in the '70s, and Craig since. I don't know that we've ever bought a piece of equipment without it being mutually agreed upon between the people that have to use it in the production department and the manager of production and the people who have to find a way to pay for it. It's been a--I don't want to say a committee decision, by any means, but participatory.

Hicke: And what about the decisions on cooperage? You told me about the sizes, but the kinds--



Phelps: Well, interestingly enough, cooperage is frequently influenced by availability. The wish list is invariably compiled by Craig and Damian and the people in the lab who are responsible for measuring results and so on. Interestingly enough, the wish list isn't always fulfilled entirely in that the amount of toast or the forest or the tonnellerie that's going to supply may not have as much as we need or may not be able to supply our need in the time frame that we would have to work with.

Hicke: How about American versus French oak and that kind of thing?

Phelps: Well, we're experimenting with combinations of the two. There are unquestionably places where the American oak is very adequate and there might even be places where it has its advantages. So we're open-minded on that, although particularly with our Insignia, we're pretty dedicated to the idea of using new French oak.

#### Vineyard Management

[Interview 2: December 12, 1995]##

#### Properties

Hicke: Let's start this morning with some discussion about the vineyard management. First of all, can you tell me how you acquired your vineyards? You mentioned the one right here, but I know you have others.

Phelps: Well, the home property was of course the first to be developed. We did the flat-lying acres on the valley floor first, and then in subsequent years, each year we would go farther back in the hills, and we eventually developed about 170 acres here, of which about 70 was hillside and 100 acres was more similar to valley floor. This occupied us up through 1978, and then in '79 we made our first acquisition, which was a fifty-acre vineyard that we had been buying grapes from. It's halfway between Yountville and Napa--from the Jesse Stanton Estate.

Hicke: Did it have a name?

Phelps: It has a name that we're just getting used to. We are now re-naming our various vineyards with Spanish names to honor the people who make the vineyards productive for us. What was the Stanton vineyard will become the Renacimiento--Renaissance--Vineyard.



Hicke: Will that be on a label?

Phelps: No. That will be an internal designation. That particular vineyard was half planted to old standard vine and half planted in 1968 to a combination of Pinot Noir and Riesling, and that was the original source of our Johannisberg Riesling and more particularly the Riesling that was successful--about two years out of three--in having botrytis infection; so that we thought the location was worth eventually owning ourselves. Only this last year have we finally taken out all the Riesling and converted that vineyard to other varieties, including Merlot and some Viognier. It's one of the more important vineyards in our down-valley operation.

In 1983, we were successful in following on with a thirty-five-acre vineyard in Stag's Leap, which is almost entirely Cabernet--a little bit of Merlot; at the same time, we bought and redeveloped in the mid-eighties a thirty-five acre vineyard on Manley Lane, which is on the Rutherford Bench southwest of the town of Rutherford. It's a well-drained, beautifully situated Cabernet vineyard which we call Banca Dorada. Unfortunately, that was one of our first vineyards to be attacked by phylloxera. So we're in the process of replanting that, and it's about half replanted at this point. We pulled everything out in '83, and originally planted it in '84 and '85. Then we began to replant it in '90; it didn't last very long.

Hicke: It was on A x R #1?

Phelps: Yes, most of it--all but five acres.

Hicke: Are you now using several different rootstocks?

Phelps: Yes. For one thing, we're at least twenty years away from having all the answers on this subject. Beyond that, we need several different selections in order to meet variables such as depth and composition of soils, drainage, water-holding capability, and intended varietal scion. Interestingly enough, when we planted rootstock in Banca Dorada in the mid-eighties, we had about five acres which we committed to disease-resistant stock experimentally. We did not do this for disease resistance, we did it because we were experimenting with devigoration--limiting productivity to learn about the impact of devigoration on wine quality. It just so happens that this experiment turned out to be very timely in that it resulted in five acres that did not need to be replanted.

Hicke: Really? So that actually was phylloxera-resistant. Do you know what rootstock that was?



Phelps: Well, actually there were several, but the two primary ones making up the five acres consisted of about two acres of 110R and a little over three acres of what was called SO4 when we planted it but turned out to be 5C. In the same vineyards we also planted a number of other rootstocks for the purpose of annually collecting and weighing cuttings to learn about their effect on canopy or foliage yield.

Then we followed in '86 with another small vineyard adjacent to our Stag's Leap Vineyard. It was planted to Merlot and Cabernet but suffered from both phylloxera and eutypa and has gradually been replanted on resistant rootstock, close-spaced. Then in '89 we purchased a vineyard in Carneros, almost on the Bay, on Milton Road. It has been planted primarily to several clones of Chardonnay and some other varieties experimentally, including Syrah.

Hicke: Do all of these vineyards now have Spanish names?

Phelps: Yes. The one I just mentioned in Carneros is Los Carneros Negros --the Black Sheep. The Stag's Leap vineyards are called Las Rocas, and the Rutherford vineyard is called Banca Dorada--Gold Slope.

Hicke: You also have a vineyard in Monterey.

Phelps: Well, we are developing vineyards in Monterey, right. The one Napa vineyard that I didn't mention is one we have on a long-term lease, which is the Bacchus Vineyard; it's on a red soil hillside on the east side of the Silverado Trail near the Oakville crossroad. That's the only vineyard from which we presently produce a vineyard-designated wine.

Hicke: And is that Cabernet?

Phelps: Cabernet, right.

#### Pierce's Disease Task Force

Hicke: Besides phylloxera, do you have other vineyard diseases?

Phelps: Absolutely. As a matter of fact, I put in the folder some information that I thought you might find interesting in terms of our involvement in research. Vine diseases such as the fan-leaf virus, nematodes, and eutypa are still a challenge but are at least susceptible to solution. The largest and unfortunately unresolved problem is Pierce's Disease, sometimes known as the Anaheim Disease, inasmuch as it was first discovered in that area



in the nineteenth century. It has reappeared cyclically, and it is again a serious problem here in the Napa Valley, focused primarily in the Stag's Leap District and on Spring Mountain. Aside from the fact that it is lethal to the vines and so far incurable, it is pretty well established that the causal bacterium is transmitted primarily by the blue-green sharpshooter. There are other vectors as well, but this one seems to be the critter that causes the most damage. At this point, efforts have been limited largely to controlling the breeding habitat of this vector, namely creek beds and concentrations of dense vegetation bordering vineyards.

Hicke: Is this in collaboration with U.C. Davis?

Phelps: We bring people in to participate from Davis, but basically they're from Davis and a couple of other entities working on the problem. You're probably familiar that this is--I won't say unique, but it's bacterial rather than viral. At this point, the best information is that the vector is the Blue-Green Sharpshooter. It lays its eggs and thrives in riparian vegetation along the creek beds at the borders of the vineyard.

Hicke: [Looking at rain outside the window] It must be doing well today!

Phelps: Well, I'm not sure. We don't really have a good handle on whether it's aided and abetted by stormy, wet weather. There are a lot of questions without answers yet.

Hicke: Well, that's what the task force is for. When did this start?

Phelps: In 1994.

Hicke: And how long do you expect it to continue?

Phelps: Until there's a solution to the problem.

Hicke: Who else is helping to fund this?

Phelps: Well, almost all the vineyards in the Stag's Leap and Spring Mountain area are participating. I think there's a long list in the folder. The American Vineyard Foundation is matching funds, dollar for dollar, that are contributed by growers and wineries, and this helps a lot. Several vineyard management companies are participating. The University of California Extension Service is very active and helpful, as are U.C. Davis and Berkeley, with the latter perhaps even more active.

Hicke: What department?



Phelps: Well, I think the principal player is Dr. Alexander (Sandy) Purcell of the Department of Entomological Sciences.

### Spacing

Hicke: What about other problems in the vineyards? You had mentioned spacing.

Phelps: Well, I don't think of spacing as a problem per se as much as an ongoing learning process. Spacing has been the subject of major experimentation and innovation in California for at least ten or twelve years. I would say that the primary objective of changing to closer spacing is to maintain yield per acre to offset decreases in per vine yields which accompany replanting to less vigorous, disease-resistant rootstock. To some degree, spacing decisions are also influenced by canopy choices as, for example, the popular GDC (Geneva Double Curtain) requires somewhat greater row spacing than a single vertical trellis system. Expenses, however, increase in direct proportion to the number of vines per acre resulting from closer spacing. This is true both in development and annual farming costs. More stakes and vines per acre to plant initially and prune each year; two to three times as much drip irrigation and trellis hardware per acre, etc. We believe that on the whole, closer spacing is quite effective in concert with the less vigorous rootstock we are now using. In the last two or three years in looking into the future, our spacing and system of choice will be five by nine (one thousand vines per acre) and the single, movable wire, vertical trellis configuration. We are using this both in the Napa Valley and in Monterey County.

Hicke: Do you prefer to own a vineyard, rather than buy grapes?

Phelps: Actually, we buy quite a large percentage of our production from independent growers. We're about, at this point, about fifty-fifty. When all of our vineyards are back in production, we will probably be 60 percent to 65 percent self-sufficient. We do enjoy working with independent growers as well. I think there's a good balance that can be achieved.

### Bulmaro Montez

Hicke: Will you tell me who your vineyard manager is?



- Phelps: From the very beginning our vineyard operations have been under the control of Bulmaro Montez. Bulmaro was just a young man, barely out of school, when he began work here in 1973. His ability to lead and to absorb technical as well as practical knowledge of viticulture is truly remarkable.
- Hicke: How did you find him?
- Phelps: Walter knew Bulmaro and his family before either of them came to work here, and he brought Bulmaro on board within days of the time that we took possession of the ranch, taking down pens, fencing, and other vestiges of the cattle ranch in preparation for planting. That first year, Bulmaro planted the twenty acres or so between the Silverado Trail and the Napa River, our so-called River Ranch. As our vineyard acreage grew, Bulmaro built the organization carefully and steadily to where, today, he supervises about forty people, more than half of whom have been here ten or more years. Several of the vineyard foremen have been here fifteen to twenty years, and we see this as a tribute to his style of leadership.
- Hicke: Jeff [Hunsaker] told me that this year you kind of went against the trend. The trend in the grape production was everybody had a lot of problems. But he said your vineyards did very well.
- Phelps: I think on average Napa Valley growers had between 10 and 15 percent reduction in productivity. We had a couple of vineyards that were off, but we had two or three vineyards that were ahead of anticipated or estimated production. So on average we had achieved our full production--our full estimate, let me put it that way. Our estimates were lower than last year to begin with.
- Hicke: That's not just luck.
- Phelps: Well, I think that Bulmaro put in a great deal of effort to help that result along, without any question.
- Hicke: I think loss of blossoms--wasn't that a problem? The hailstorm?
- Phelps: Well, actually, the hailstorm came after the crop had set, so he was probably referring to rains during bloom, which tended to reduce yield in many vineyards.
- Hicke: What can the vineyard manager do to overcome it?
- Phelps: Certainly nothing about rain or hail, but beyond that, careful attention to the irrigation regime is probably the most significant thing, once the crop is set and for the balance of the growing season. At a time when the vineyard needs a little boost, the application of water is probably the most significant factor,



although canopy management--leaf thinning, hedging, and cluster thinning--all play an important role in quality control.

Hicke: Are there certain grape varieties that you prefer to buy?

Phelps: Well, we've made the decision not to plant Riesling, but we still intend to produce a small amount of Riesling dessert wines when we can find and purchase botrytised grapes. The same is true of Muscat, which we use in our Beaumes de Venise style Vin du Mistral dessert wine. We intend to continue purchasing, rather than planting, Carignane, Alicante Bouchet, Petite Syrah, and Cinseault for the Vin du Mistral program.

### Trellising

Hicke: What about other vineyard management problems or factors?

Phelps: In my mind an area of change over the last ten years of critical importance is related to improvement of canopy control through selection of trellis systems, together with such efforts as hedging and leaf thinning. The traditional, conventional T crossarm and two-wire system is a thing of the past. I believe the most significant trellis systems available now are to be movable, vertical wire, single canopy system (which we use), the lyre, and the Geneva Double Curtain. Each of these systems, together with hedging and leaf thinning, improves grape quality by increasing the amount of ventilation and sunlight reaching the fruiting zone of the vine.

Hicke: So you've got most of at least your own vineyards on the movable vertical. And how about your growers? Do you have something to say about their systems?

Phelps: It depends, as certain grower relationships that we have where we're involved at the time the vineyard is developed and are asked to participate; others are of course already in existence, and in those cases we try to work out in advance with the growers a cooperative approach where we may pay a little extra in order to get leaves stripped, some of the crop dropped if there is a need and we have problems facing us. We find that most growers nowadays are pretty much aware of canopy control and are willing to cooperate with management of the canopy system in a way that is pretty effective.

Hicke: But the impetus for canopy management came from the winemaker or the winery?



Phelps: Yes, I think our North Coast Viticultural Group, with U.C. Davis help, pioneered canopy control in the eighties and actually borrowed a great deal of the technology from Europe as well.

Hicke: From France, or what part of Europe?

Phelps: Yes, primarily from France.

#### Grower Contracts

Hicke: When it comes time for harvest, how do you work with the growers on deciding when to pick?

Phelps: Our contracts invariably call for that to be the decision of the winery. The growers respond within a few days, or a day sometimes if we need to have the crop taken off.

Hicke: And you have to manage bringing in the crops also, so you don't get it all in the winery in the same hour.

Phelps: Right. That's a finely tuned, finely orchestrated process that Craig is in charge of, but he has an excellent communication system developed with the people in the production department and in the vineyard to execute that.

Hicke: It must be very complicated, especially when the weather causes unexpected difficulties. Anything else about the vineyard?

Phelps: Nothing more that I can think of at this point. I think maybe you are very much aware that probably the most significant change in winemaking philosophy over the last twenty years has been the shifting of focus to the source, to the vineyard.

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Phelps: Twenty years ago and before, the industry tended to have a rather simplistic view: what to do to make wine was determined by the equipment and by the processes that were employed in the winery. Gradually over the years we've come to realize that wine is basically a product that is dependent on how the grapes are grown, much more so than how grapes are processed here in the winery. That's been a major change in how we look at winemaking.



Designing the Label

Hicke: Let's go back and talk about the label for a minute. How did you design the labels? For example, how did you decide to label each product differently, as opposed to using one label for all?

Phelps: Actually, what we have now is a variety of labels that are based on families of wines. Our principal brand is Joseph Phelps Vineyards, and the varietal wines of Joseph Phelps Vineyards have the same label essentially, with minor changes depending on whether they're red or white. And then in the case of the vineyard-designated Bacchus Vineyard, the label is slightly different to accommodate the vineyard name.

The Insignia brand, which is dealt with separately, is another label variation. And then our family of Rhône-style wines under the label of Vin du Mistral is a third. From time to time, we have a Rhône-style wine called Pastiche that has a separate label to separate it from the other Vin du Mistral wines. Then a label for wines from our young wines that don't otherwise make the grade for the Joseph Phelps brand is called Innisfree. Our production of Innisfree has declined substantially over the years; we no longer need that label nearly as much as we once did, so that's become a less significant member of the family.

Vin du Mistral and the Rhône Rangers

Hicke: Since we're on the subject, let's go into these different labels. First of all, the Vin du Mistral. How did that come about?

Phelps: We originally made a Syrah under the Joseph Phelps label, and then in 1989 we were ready to introduce Viognier commercially and Grenache Rosé. And at that time, we decided to put our Rhône-style wines under a different family name and a different label.

The name Vin du Mistral was chosen for reasons best described on its original back label, written for us by Gerald Asher, referring to the Provençal phenomenon Le Mistral. "Only the sturdiest of temperaments, it is said, can live with this wind that scours the Rhone Valley from the Alps to the Mediterranean. The vines of that valley, too, need vigor and tenacity to resist it--the reason, perhaps, why the wines made from them are prized for their boldly individual character. When grown in California, these Rhône varieties display that same distinctive character, thus our choice of the term Vin du Mistral to describe them." The most important member of that family was one we talked about



yesterday, which has been somewhat of a marketing problem, and it requires consumer education, because American wine buyers are prone to choose a varietal and are, as a group, reluctant to experiment with wines they don't recognize the composition of. The blend of Rhône varietals which we call Le Mistral, is a gorgeous wine, a wonderful wine in the Chateauneuf du Pape style but it does not have the consumer acceptance that the varietal wines have. Someday it will!

Hicke: Several other wineries came along with Rhône blends. Were you in communication with them?

Phelps: Yes, to a certain extent. Some of the more significant players in this game were Randall Grahm at Bonny Doon with his Cigare Volant. It really got the tradition going for a blend. I think that Bonny Doon, Qupé, Sean Thackrey, McDowell Valley, and Estrella were pioneers and important players in the advent of the Rhône Rangers--not to leave out the reality that with Syrah, we were the very first of the Rhône-style producers [laughter].

Hicke: I was going to say it's more likely the other way around.

Phelps: From '74 on, however, our focus was on Syrah; the other varieties, such as Mourvèdre and Grenache didn't find their way their way into our repertoire until the late eighties, although we have been working experimentally with Voignier since 1983.

Hicke: Pastiche is one of the Rhône wines, as you mentioned. Can we talk more about that?

Phelps: Pastiche is a product that we make when we have more Grenache and/or Mourvèdre than we can use in Le Mistral. We are able to bring it out a year earlier than Le Mistral and sell it for a slightly lower price. So we use the strategy of a separate label for that wine to separate it from Le Mistral.

Hicke: Is it mostly Grenache or all Grenache?

Phelps: I would say mostly, in that it's usually 50 to 60 percent Grenache.

### Insignia

Hicke: Now can you tell me about Insignia?

Phelps: I'd love to. Insignia is a great story in and of itself. Our first Insignia was the '74 and came about as a result of



discovering that we had a single tank of truly great Cabernet from a vineyard in Stag's Leap immediately adjacent to what became, nine years later, our Las Rocas Vineyard. Although the '74 was mostly Cabernet with only a small amount of Merlot, we knew that we wanted a name for this wine that would give us the long-range ability to blend superior selections of Bordeaux grape varieties without regard to the limitations of the BATF regulations governing varietal labeling. - We decided that our label should refer to this wine simply as "a red table wine" and that the perceived quality would ultimately speak for itself. The "reserve" designation, which was in vogue at the time, had already been compromised by large producers, and had no recognized definition within the wine industry. Therefore, the proprietary name Insignia was selected to represent the finest lots available from each vintage, and to emphasize the importance of blending over varietal designation as a determinate of quality. We are steadfast believers in varietal integrity whenever a variety is shown on the label, but we are equally committed to the idea that blending, in certain cases, can truly enhance other wines, adding interest and value for the customer. We were the first California winery to introduce a high-end proprietary label and remained alone in that field until 1984, when Mondavi-Rothschild brought out Opus One. The idea caught on eventually and has become a class of wines called Meritage.

Hicke: Another pioneering step.

Phelps: We were all alone on that for a number of years. We brought the '74 out in '78, and it wasn't until '84 when Mondavi/Rothschild introduced the '79 Opus One that there was a second Meritage wine. Now I think there are probably twenty-five to thirty at least.

Hicke: Isn't there a Meritage association?

Phelps: The Meritage Society, right.

Hicke: Did you help found that?

Phelps: We were involved in that for the first couple of years, and then eventually decided we would go our own separate way.

Hicke: It's a marketing organization?

Phelps: Yes.

Hicke: How did you market this Insignia?

Phelps: Well, it sort of marketed itself in that we had never made that much Insignia, so that it was almost always an allocated wine. We



have, I think, been successful in keeping the quality at a level which tells the story in itself.

Hicke: You don't offer that for tasting? Do you offer it to restaurants?

Phelps: Actually, Insignia, like all of our other wines, is sold through a national distribution system. And yes, we certainly try to see that the Insignia is presented as a on-premise wine. Also, it's a very popular collector's item; so there's a demand for it certainly in the off-premise retail outlets.

### Innisfree

Hicke: Okay. Innisfree.

Phelps: Innisfree was originally created as a way of using grapes that were not up to the standards that we wanted in the Joseph Phelps brand. We had a couple of vineyards that we had planted here on the ranch with Chardonnay, and we felt that the climate was a little warm here, and those grapes normally didn't make it into the primary brand. Innisfree was a good outlet for that. Young vines, in the first, second, and third year of production, from any of our vineyards generally found their way into Innisfree. In reality, the Innisfree became a second label.

### Ovation

Hicke: You also have another one called Ovation.

Phelps: Exactly. That's a sweetheart. It's a Chardonnay that is selected at the time of harvest and then dealt with in a much more intense way. It stays on the lees for fourteen to fifteen months and is treated with a lot of respect and becomes a unique wine in and of itself.

Hicke: And that's pretty new?

Phelps: Yes, the '93 was our very first Ovation.

Hicke: And you're not producing very much of that.

Phelps: No, it's a limited wine.



Winemaking Philosophy and Techniques

Hicke: Well, we haven't talked too much about the actual making of the wine. Do you have a philosophy for winemaking?

Phelps: Well, what's even more important is that Craig certainly has a philosophic approach to winemaking which I totally endorse. I have seldom had an opportunity to see growth and development as dramatic as that which has taken place with Craig in the twenty years he has been with us--both as the winemaker and as a manager of people. Yes, his approach is philosophical--but at the same time it is a unique blend of intellectuality, passion for the subject, and dedication to the highest standards.

It is no secret that our brands were impacted by a combination of factors in the late 1980s, ranging from grape sources and vineyard problems to overloaded facilities and a couple of difficult vintages. Craig deserves full credit for turning this situation around through his work with Bulmaro in the vineyards, his design and construction of additional production facilities, his judicious use of consultants, and openness to new and different ideas. The results have been phenomenal in terms of both critical acclaim and a renaissance of winery sales and profitability.

Hicke: I'd like to ask you some specific things, like about the cooperage--what kind of barrels and how long you put the wines in the barrels.

Phelps: Okay. I think I mentioned yesterday that we use primarily French oak for our Cabernet and especially for Insignia. We use a small amount of American oak with the Napa Valley Cabernet and about 40 to 50 percent American oak with the Rhône-style wines.

Hicke: I must have seen at least four or five different French oak coopers on your barrels.

Phelps: Right. That is intentional and by design in some instances, and in other instances it's based on who can make the delivery of a specific barrel that we want at the time that we need it. So sometimes that's by design, and sometimes it's by process.

Hicke: You specify the toast?

Phelps: Yes.

Hicke: Individually for each varietal?

Phelps: To some extent, right.



Hicke: Bottles and corks?

Phelps: [laughs] We have the same problem that the industry as a whole is faced with. I don't know that there's anything unique in our experience in terms of glass, but we certainly have had our share of problems with corks, and we go to great lengths to try to keep that under control. There's not an awful lot to elaborate on in terms of the cork problem; it's going to be with us, I think, until another sealer is accepted by the consumer.

Hicke: What can you do to keep it at a minimum?

Phelps: We've been, I think, fairly successful in increasing our ability to test and preselect cork now. We have much more rigid specifications than we once had; it's just a matter of constant vigilance.

Pinot Noir, Zinfandel, Sauvignon Blanc, Gewürztraminer, and Sémillon

Hicke: Let me ask you about the Pinot Noir. I know you had some earlier when Walter Schug was here.

Phelps: Right. Pinot Noir has never been a very successful wine for us, and one of the reasons is that we believe that we're not a large enough winery to focus on both the Cabernet and Pinot Noir. So gradually over the years, as our Pinot Noir vineyards were replaced, we have increased our focus on Cabernet Sauvignon. It's been a constant struggle for us to resist the temptation to try to be all things to all people and make fifty-seven flavors [laughter]. So wherever it's made sense for us, we have reduced our repertoire. But we still manage to produce twenty-two superior flavors.

One of the easy reasons why we don't make Pinot Noir is that we no longer have Pinot Noir vineyards, and the same is true of Zinfandel. We no longer grow Zinfandel on any of our properties. We continued through 1990 to make a small amount of Zinfandel from a wonderful vineyard in Alexander Valley (Demonsthenes Brothers) that had sourced us since 1975, and when that source was no longer available, we discontinued making Zinfandel, although at one time we had thirty-some acres of Zinfandel on this property. We've placed our red wine chips on Cabernet and the Rhône varieties.

Hicke: There are three other whites that you make or have made: Sauvignon Blanc, Gewürztraminer, and Sémillon. What's going on with those?



Phelps: Sauvignon Blanc will be always an important varietal for us, because we have a fair amount of that variety planted on this ranch and it does very well here. At the same time, we only make about half as much now as we made at one time. The basic problem with Sauvignon Blanc, given the farming costs in the Napa Valley, is that it is a wine that, except for barrel time, costs almost as much as Chardonnay to make, and does not command a Chardonnay bottle price. Economics becomes a limiting factor.

Moving on to Gewürztraminer, we no longer grow that variety. We continue to make a small amount--maybe a thousand cases as opposed to the five or six thousand that we made at one time.

Sémillon is a variety that we grow for two reasons--to blend with Sauvignon Blanc, or when Botrytis comes, to make a dessert wine. Our dessert Sémillon is sold under a beautiful proprietary label and is called "Delice du Sémillon." It is a very, very popular wine in the one year out of three we're able to make it.

### Scheurebe

Hicke: And tell me about Scheurebe.

Phelps: Scheurebe is unique to our winery. It is a hybrid crossing of Sylvaner and Riesling, and was developed in 1916 by Dr. George Scheu, a German botanist. The name of the variety is, literally, "Dr. Scheu's grapevine."

Hicke: And Walter Schug knew about this, I suppose?

Phelps: Yes, absolutely--he selected the first cuttings in the Rheinpfalz, and our first harvest was a '78 Auslese-style. We made several vintages of similar wine through 1984, and only intermittently since. The vineyard was replanted and beginning in 1994, we are producing Scheurebe under the proprietary name "Eisrebe" which is made in the tradition of the German Eisweins, but rather than having been frozen on the vine, which can't happen in California, it is refrigerated commercially and kept in a frozen state until it can be brought back to the winery following the regular crush. As the ice crystals begin to thaw, the concentrated juice is pressed out and most of the water in the grape remains with the other solids in the press. Thereupon it is fermented and treated the same as any high-must weight dessert wine. Incidentally, that's going to happen tomorrow with the '95 Eisrebe.

Hicke: You mean you're going to press it--it's in refrigerated storage right now?



Phelps: In Sacramento, right. We are just releasing the '94; I had it at a dinner at another winery Sunday night and it was just gorgeous.

Hicke: It's something like 39 percent sugar? Is that what I read?

Phelps: Yes.

Hicke: That's wonderful. I just read about it in your newsletter. Now, you can't depend on the botrytizing every year, though, can you?

Phelps: That's right. One of the advantages, of course, of this process is that we can reliably produce an eisrebe dessert wine every year.

Hicke: Oh, I see. It doesn't have to be botrytized.

Phelps: No, it helps. If the grapes can be botrytized, it would be that much better, even if they were slightly botrytized, but if they're left to hang out and can reach twenty-five or twenty-six degrees Brix, that's a good start.

Hicke: And did you ever make a Scheurebe wine other than the dessert wine?

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Phelps: We harvested the Scheurebe every year and made it into a small amount of wine, but only in the years when it was infected with botrytis were we able to make a dessert wine and keep it separate. In the other years it was just simply blended into the Riesling, adding complexity.

Hicke: But you never made a varietal?

Phelps: No, not as a table wine. The highest and best use of Scheurebe is as a dessert wine, and if it doesn't go to a high must-weight level, the wine is not that special. They do make a certain amount of Scheurebe in a couple of the German winegrowing regions, but it's not sought after. It doesn't have the character of Riesling when it's dry.

Hicke: Are there any varietals that I haven't brought up that we need to talk about?

Phelps: I think we've covered everything that we produce in commercial volume. We do make experimental and small lots of an additional eight to ten red and white French and Italian varieties, but these as yet are not in the distribution system.



Hicke: We've covered all the ones that I've read about. You've also made table wines--Vin Blanc and Vin Rouge.

Phelps: Those were the wines that subsequently became known as Innisfree. Young vines or ranch-grown grapes that didn't make the cut for the brand.

### The Innisfree Building

Hicke: And you now have a new building; isn't it called the Innisfree Building?

Phelps: Right. That is actually our red wine facility. Most of our white wine is made here; we can make white wine down there, but most of that facility is dedicated to red wine.

Hicke: And when was that built?

Phelps: In '89--we moved into it in '89.

Hicke: You simply outgrew this facility?

Phelps: Yes. And we had been storing barrels in other locations around the valley and wanted to bring everything into one place. Now we have again reached that point where we rent space for barrels in other wineries. So we just took out a building permit, and we will start with construction of a 17,000-square-foot addition to that winery, which will be all barrel storage. Since Innisfree is no longer applicable, we are renaming that facility.

Hicke: Another thing I found very interesting was Jeff was telling me you do a lot of recycling; something like 100 percent of the water and also cardboard and glass.

Phelps: Well, let's talk about waste water. Nothing leaves the property except some insoluble solids and wine; most of the insoluble solids, in fact, go back into compost. Grape solids, skins and seeds, go back into the vineyard also in the form of compost. The processing water goes back into the reservoir eventually for irrigation purposes, and everything else that comes stays here in the form of grape juice converted into wine.



Private Labels

Hicke: Another thing that I saw on my tour was boxes of private labels. Can you tell me about that?

Phelps: Like many of our fellow vintners, we have a following of restaurants, athletic clubs, country clubs, and alumni associations, etc., across the country that have asked us to do private labels over the years. We're actually reducing the amount of that work that we're accepting, and I think probably within five years we won't do any private labeling at all. Only when it's for a very special situation.

Marketing and Distribution

Hicke: Let's talk a little bit about marketing. Who did the marketing originally?

Phelps: I sold the first release--almost all of it anyway. In March of 1975 we had our first person that was not in the production field come aboard, and that was Bruce Neyers, who came on as a tour guide and took over the marketing of the wine from me at a time when we had six hundred cases left to sell, and grew into the job of being our national sales manager. He was with us for seventeen years and made many valuable contributions. When Bruce left four years ago, we were able to retain Tom Shelton, who has just become president of the company and is also national sales director.

Hicke: How did you expand your market?

Phelps: Through the use of a distribution system, a network of distributors.

Hicke: You don't have any one distributor; you have different ones for different parts of the country?

Phelps: Yes. Distribution of alcoholic beverages is highly fragmented in a regional way. There are some distributors who own wholesale houses in several states--Southern Wines and Spirits and NPC [National Distributing Company] being good examples. NPC is our distributor in Florida, Georgia, South Carolina, New Mexico, and Colorado, so they're a big player, but they appear as separate companies in each of those states.

Going back to the repeal of Prohibition, the local-option movement was conceded by the federal government as a way of



enlisting or getting enough states to sign the amendment. The individual states were given the right to control the distribution of alcoholic beverages at the repeal of Prohibition, so it's a maze of frustrating rules and regulations, and each state has the right to tax importation of alcoholic beverages and to regulation of the distribution of alcoholic beverages including wine. There is no way that we can sell wine directly into any other state except California. So we need a licensed importer in each of those states, even if we only had two cases of wine to sell.

Hicke: How about international? Do you export?

Phelps: Yes. We hope and expect to put more emphasis on exporting as time goes by. Our primary export markets now are in Canada, the Caribbean, Germany, Scandinavia, and an increasing amount to the Pacific Rim. The U.K. [United Kingdom] is always there but not as prominent in California exporting as it once was. The British economy is very sluggish right now, and the British market really can't afford California wine; they don't want to pay the price.

Hicke: Is Scandinavia a big one?

Phelps: It's growing. Primarily Sweden and Denmark have increased 200 percent to 300 percent in the last two or three years.

Hicke: Do you or does Tom Shelton do a lot of traveling?

Phelps: Tom does a lot of traveling. I don't travel any more than I absolutely have to, which is maybe four or five times a year.

Hicke: We were up at Tahoe last week, and I think he was doing a winemaker's dinner up there. I suppose that's a major part of his life.

Phelps: Yes, both he and Craig are involved in that.

Hicke: That's fun for everyone. Well, I don't know how much for the winemaker, but it's fun for the people that attend.

Anything else about your sales at the winery or other areas of sales and marketing?

Phelps: Retail sales at the winery have always been an important component of our overall sales program. As you probably noticed, we have a new guest center and a new retail sales room. We look forward to increasing the amount of wine that is sold here at the winery.

Hicke: Was it a conscious decision not to have an open tasting room?



Phelps: No. In 1973, when we obtained our use permit, it wasn't possible; the tasting rooms were limited to Highway 29, and the only available use permit at that time permitted tours and tastings by appointment only, which was fine with us, and we've lived with that very comfortably over the years.

Hicke: And I see that you now have a club: Phelps Preferred?

Phelps: It's a mail-order, retail consumer organization. It seems to be off to a very good start.

Hicke: How did you launch that?

Phelps: By introducing people to the concept here at the winery when they visit. And by use of a consumer mailing list that we had built up over the years based on people who had visited the winery or have ordered wine in those states where we can ship wine--that's limited by the reciprocity laws of individual states.

Hicke: How do you decide what to offer to club members?

Phelps: The decision is usually based on supplying a wine which isn't going to be easy for the consumer to find--allocated wines or some special reserve wines that are not just an ordinary garden variety, really.

Hicke: I wanted to ask you the Wine Services Co-op. I know you were president of a while. Did you help start that?

Phelps: Yes, as a matter of fact we did. It's been an extremely successful organization; it has thirty-three member wineries now. At one time it was as many thirty-six, almost forty. It's a real pleasure to look back over the years and see how successfully that was cooperatively developed by the wineries.

Hicke: Tell me how it started.

Phelps: Actually, it started as a co-shipping group, and we would have containers at one winery or another to go to southern California. There were five original members. Each winery would deliver its wine to the location where the container was set up and shipped together. That went on for about two years, and then in 1976 we built the very first co-op, which was a 40,000 square foot building and by '78 we had it full. We had to add 70,000 feet. And then by '84 we had to build another addition, and then that used up all the available property. In fact, there was a lot of interest and effort that went into getting that additional property for the '84 addition. That was the last addition there; now the co-op has a piece of property south of Napa at the airport, and we will build another building in that location



eventually. The mode of the co-op has generally over the years been that the increased business is based on expansion of the existing member wineries, rather than seeking new members.



## IV OTHER ACTIVITIES

Oakville Grocery

Hicke: Okay. The Oakville Grocery. How did that come about?

Phelps: The Oakville Grocery sort of evolved as a result of my interest in having a means of presenting the idea that food and wine are synergistic and complementary.

Hicke: This was 1978; you were way ahead of your time on that one.

Phelps: Not necessarily. You must remember that Robert Mondavi got us all headed in that direction with the Great Chefs program that he introduced in '75 or '76, and then Beringer of course, with Madeleine Kaman in the late seventies, originated the idea of teaching people to cook right there in the winery environment. This is simply another way of projecting the idea that food and wine belong together.

Hicke: Tell me how you got the idea and how you went about it.

Phelps: The original concept that I had was to develop little food markets in different regions of the United States. The first idea was to go into Scottsdale, Arizona. This all came about because I had purchased a condo in the little desert town of Carefree, Arizona, north of Scottsdale. In the process of furnishing that condo and buying the kitchen supplies that were necessary, my wife and I went through several different department stores in the Phoenix area. My observation was that the women of the Phoenix area were very noticeably attracted to cooking demonstrations, to cookbook signings, to shopping for expensive saucepans and cookware. And yet there was no place in the entire Phoenix area where you could reliably buy fresh mushrooms; very little fresh seafood, if any, no serious cooking ingredients. You couldn't buy saffron. You name it, you couldn't find it.



So it dawned on me that the people of Phoenix and Scottsdale were ready for the wave of cooking interests that had come to California ten years earlier, but there was nobody there to supply them. So my original thought was that I would open a shop there which would bring California products to Scottsdale; then I might eventually develop a way of opening other shops, say, in Michigan, where I could ship back Midwestern products like morel mushrooms and so on to the Bay Area in airfreight containers. That probably was just a piece of blue sky, and I didn't really ever get involved in that, but I hired a young man, John Michaels, to help me with the planning and research that would be involved in opening something like that. I was going to call them the Le Fleuron shops, because we had another wine label at that time called Le Fleuron. It wouldn't have been a good name at all for a grocery store, but anyway, that was the project.

John was a half-owner in the Oakville Grocery. In the process of working together with him as a consultant on the Le Fleuron project, John, after about the third meeting, proposed to me that we should really just consider buying his interest in Oakville Grocery. He would go to work for us, and we would open a store in San Francisco and forget about Scottsdale. So within a matter of a year or so, we were looking in San Francisco and eventually did open a store there which lasted for five years. But it was a bad location and--

Hicke: It was on Polk Street?

Phelps: It was on Pacific right between Larkin and Polk.

Hicke: And there was no place to park, as I recall.

Phelps: Parking was a real problem, right. So eventually we closed that store, and then a couple of years later opened in Palo Alto at the Stanford shopping center, and then our third store was opened last year in Walnut Creek. We're looking for a fourth location now.

Hicke: It's practically world famous.

Phelps: Well, people love the Oakville Grocery.

Hicke: Yes, you can hardly get around it on a weekend--people are just piled up there. And do you have a philosophy for the store? Fresh ingredients and so forth?

Phelps: Yes. It started basically as being designed as a source of rare and hard-to-find ingredients for serious cooks. But Steve Carlin, who is Oakville Grocery president and general manager, has sort of developed that into a much broader concept, with a heavy emphasis now on prepared foods, particularly in Palo Alto and Walnut Creek,



where we have enough space to have kitchens. At Walnut Creek we enlarged our repertoire to include a pizza oven and a rotisserie, so that it's becoming closer and closer to a restaurant [laughter]. There is a little space at the Walnut Creek store to sit outside in good weather.

Steve is a great team-builder and visionary, and brings a lot of talent and energy to the task of building an ever-better specialty food organization.

### Personal Wine Collection

Hicke: Okay, I'm going to skip around here a little bit. I want to ask you about your own wine collection and how that got started.

Phelps: It started in the sixties, I guess. We had a couple of wonderful stores in Colorado that had great wine selections and didn't charge an arm and a leg for imported wine. One was Harry Hoffman's in Denver and then the Boulder Liquor Mart in Boulder; they were great sources for wine collectors. I just gradually developed a collection in Colorado, which I then moved here in the early eighties when I had a place where I could build a good cellar.

And then I began--I would say it was the mid- to late seventies--I began to buy wine at auction at Christie's. We developed a way of getting the wine here; that had been a barrier before. We had an arrangement with a warehouse in London to store the wines until there was enough to make a shipment worthwhile, and then we would fly the wine into San Francisco. I would say that at least half of the wine that I have in my cellar now was bought at Christie's.

Hicke: Do you concentrate on certain kinds of wines?

Phelps: I had some vintages that were important that I would generally bid on. I did kind of focus on certain estates in Bordeaux. I wasn't that selective in Burgundy. But ports, Burgundy, and Bordeaux certainly, were focal points, and good Rhône wines when I could find them. The auction didn't offer the wines of the Rhône valley to anywhere near the extent it did the others. So I don't have as good a selection of Châteauneuf du Pape, for instance, as I would like.

Hicke: Well, you're making it [laughter].

Phelps: But old wines is what I'm referring to.



Hicke: Yes.

Phelps: I focused on Mouton-Rothschild, on Latour-Rothschild, on La Mission Haut-Brion, and Gruaud Larose. I have a lot of vintages of those.

Hicke: You pull them out once in while and pop the cork?

Phelps: Yes.

Hicke: I wanted to ask about some of your other professional activities. For instance, you've mentioned the North Coast Viticultural Research Group. Can you tell me about that?

Phelps: Actually, that's not an activity that I have been directly involved in. Craig and Bulmaro are much more active in the viticultural organizations; I served for a number of years on the board and a couple of years as the president of the Wine Service Co-op, and then I was president of the Napa Valley Vintners Association. I was on that board for four years. I was president in '83, and helped lay the groundwork for a cooperative effort with the growers to develop an appellation "education" group to promote the brand new Napa Valley appellation. It was the first U.S. viticultural region to be approved by the BATF, and that was in 1983. Under the plan, growers selling grapes to the Napa Valley Vintners Association members were asked to contribute through a small assessment on each ton purchased by the members and forwarded to the committee. Each of the wineries then added a larger assessment based on the tons of grapes purchased in the valley. That effort was completed during Greg de Luca's term as president in 1984. During John Trefethen's term in 1985, that effort was firmly in place and it's been a real success.

##



## V SIGNIFICANT CHANGES IN NAPA VALLEY AND WINE INDUSTRY

Hicke: In view of the fact that you're getting more and more hoarse, I'm going to ask you if you could just briefly tell me about what you think are the significant changes in the Napa Valley in the wine industry here. That's a big one to do in five minutes.

Phelps: I think the most important changes in the wine industry in the Napa Valley certainly include the consolidation of ownership in larger companies. I think there is a very significant change in progress there. I don't see it as either bad or good, but it's one of the major changes in the profile of the valley.

The new awareness of the importance of vineyards and vineyard control to the quality of wine has influenced some radical changes in vineyard development, which are all to the good.

The marketing of wine--not just limited to the Napa Valley, certainly--I think it affects all of the wine-producing regions of the United States in that the marketing of wine has become much, much more sophisticated and demanding.

Globally, though, I think the biggest single change is the quantum leap in quality and consistency in both Napa and Sonoma--maybe all over California--in relation to the other wines of the world. This phenomenon is, in fact, the most noticeable change to me. Is that five minutes?

Hicke: Is there anything we've missed, that we haven't covered?

Phelps: Maybe we've missed some things on history. I can't think of anything particularly in the wine industry. But I would like to mention a few of the people who significantly influenced and contributed to my involvement in the wine industry: Jack Davies, Chuck Carpy, Joe Heitz, Angelo Sangiacomo, John Trefethen, and Justin Meyer. They are all friends and associates in Napa or, in the case of Angelo, Sonoma.



I think that one of the more profound changes in Napa Valley has been what we've seen in the redevelopment of the vineyards and what the impact has been of phylloxera. That of course isn't a planned change, but I think that it's been handled and controlled very well; instead of a disaster, it's been turned into a positive improvement. And the wines of Napa Valley will, I think, continue to improve for a number of years as a result of the replanting, making a new valley out of it.

Hicke: Can you elaborate a little on that--they're planting varieties that are more adapted to the microclimates?

Phelps: Actually, there are several things that can be factored into that. It's an opportunity to rethink the varieties, number one. But it's also an opportunity to switch to improved or better clones. Clonal selection was not terribly important twenty years ago; now it's very important, and it gives us an opportunity to reorchestrate the unique clonal attributes that we didn't even know existed maybe twenty years ago. And we talked a bit earlier about how this replanting has provided an opportunity to go to different and more appropriate vine spacing, better trellis systems, canopy control, and another opportunity to make sure that we exercise better judgment in where we put a given variety that will give it the best exposure and the best terroir. I think all of those things working together will produce dramatic increases in the quality and consistency of Napa Valley wines.

Hicke: Maybe you could just tell me one more thing: what has been the biggest satisfaction for you in your life?

Phelps: I think the thing that I feel has been very, very satisfying to me, and that I look back on as something that maybe sets me apart from a number of other people is the good fortune that I've had in experiencing several careers. I look forward to growing in other directions the rest of my life. I had a very, very successful career in construction, and I feel that it's been interesting and productive to spend the last twenty-some years in the wine industry. That has permitted me to have another interest in the field of specialty foods and cooking. I'm confident other doors will continue to open and lead me in other directions as well. Another great source of satisfaction for me has been my children and the way my family has grown and developed in an independent way. Aesthetically speaking, I believe this winery has been an object of great satisfaction in that it says a fair amount about me and things that are important to me. It reflects my appreciation of design--especially the integration of design with nature; up close it reflects a devotion for attention to detail and from a distance it shows a good relationship between function, scale and visual experience. I'm very proud of it and of the way it enhances its small place in the world.



Hicke: I think the key is that you look forward; you said you look forward to other things, and I think that's why it happened. It's not just good luck. You've always looked forward.

Phelps: And I hope I continue to.

Hicke: Well, I want to thank you so very much.

Phelps: Sure. It's been my pleasure.

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## TAPE GUIDE--Joseph Phelps

## Interview 1: December 11, 1995

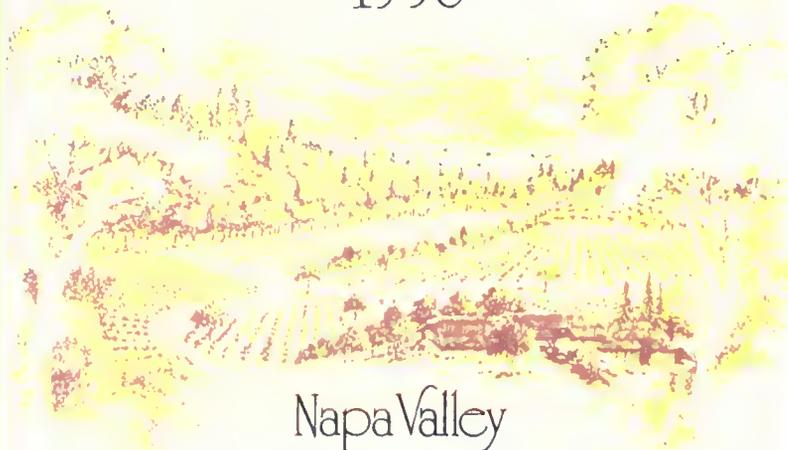
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Joseph Phelps Vineyards  
1990



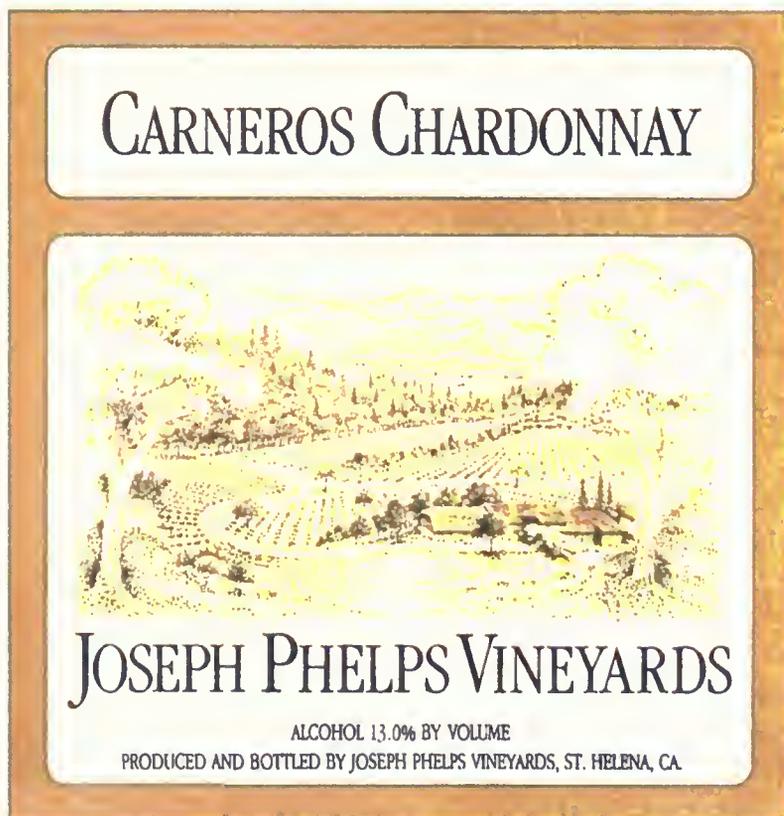
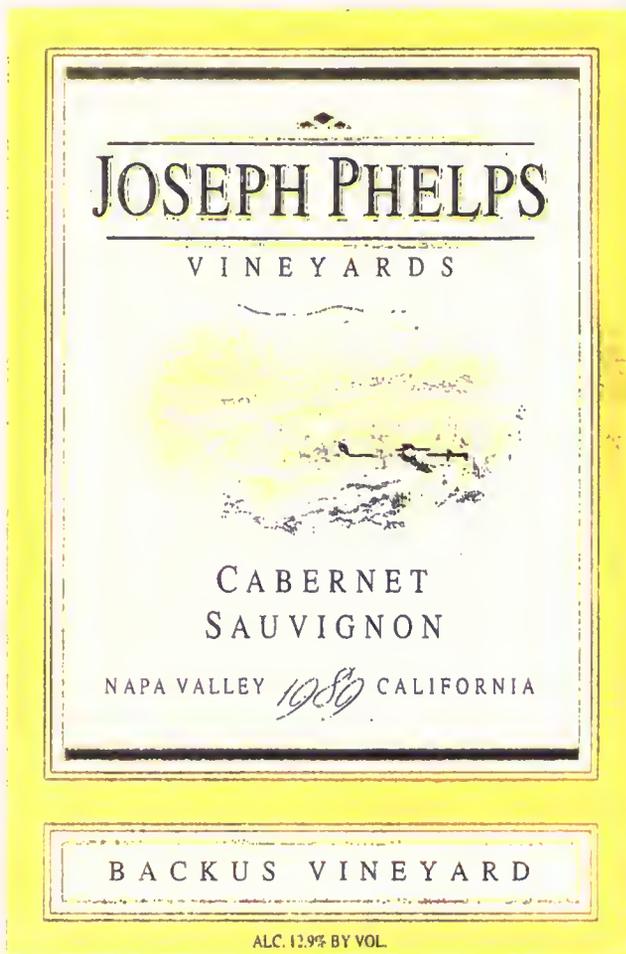
Napa Valley  
Johannisberg Riesling

Alcohol 13.0% by volume.

Produced and bottled by Joseph Phelps Vineyards, St. Helena, Ca.









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